

Exploration Archives 4.5

Desktop Manual

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1.0 Exploration Archives Desktop

Exploration Archives Desktop supports the full cycle of data acquisition, storage, cataloging and exporting, and ultimately downloading data to a workstation. The functionality is flexible for any workflow and supports collaboration across activities.

New in this version:

There have been some updates to the system framework in this version (Click to expand):

- Search Results - Added a Max Search Results Setting
- Add To Cart - Well Products
- BULK EDIT (Add Prepend Option)
- Software License Key (New MaxUsers Field Added)
- Software License Key (New Max Other Seismic Added)
- Ternary Category - Add New Third Tier for File Category

  File Transfer - AWS Deep Archive Storage support
- Send seismic (entity) lists
- Framework Assembly Changes
- Map Selection Tools
- Desktop - Batch Move additional tool - File Separator

To open Desktop:

1. Double-click the Exploration Archives icon on your desktop. If prompted for log in credentials, enter your user name and password.



> **Note:**
> If your system uses Windows® Active Directory®, you will not be prompted for a user name or password.

2. If needed, select the database connection from the drop-down list.
3. Click **Login**.

> **Note:**
> If you forgot your password, contact your administrator for assistance.

For an overview of the general workflows for managing your data in Exploration Archives, refer to "Workflows" on page 261.

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New in this version:

There have been a couple of updates to the system framework in this version:

- Starting with version 4.3 Exploration Archives now supports ultra HD resolutions and has improved font scaling.
- The Grid column chooser has been updated so you can now: filter, select all, and hide all.

Updates have also been made to Maps:

- Improved group layer support and visibility.
- Added support for Bing Maps.
- Added additional support for custom map projections.

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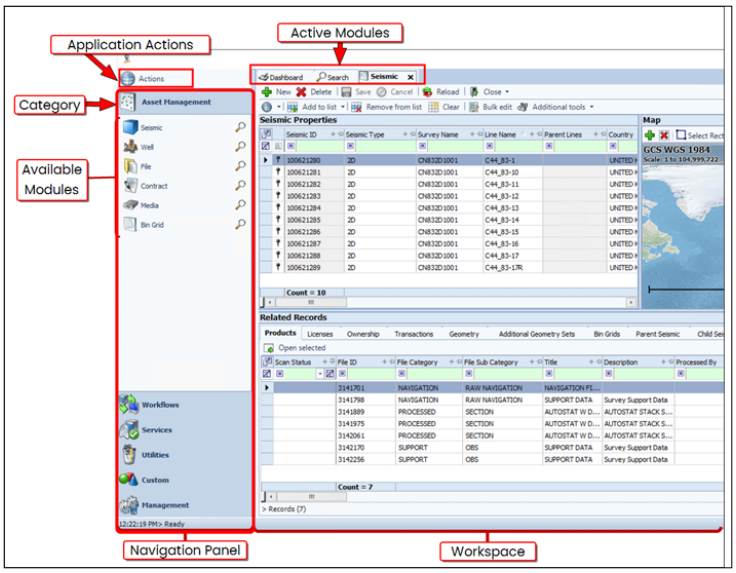
For an overview of the general workflows for managing your data in Exploration Archives, refer to "Workflows" on page 261.

2.0 Get started

Exploration Archives provides a comprehensive set of tools for managing and accessing your exploration assets. Your administrator sets the configurations and determines your level of access to the modules, tools, data and editing capabilities. With the role-based security, external partners, service providers and contractors are able to contribute to your data management projects.

2.1 Desktop layout

The Desktop screen is divided into two panels: the **Navigation Panel** and the **Workspace**, with various controls laid out.



The **Navigation Panel** provides quick access to all areas of the application and remains constant throughout the application. To collapse the **Navigation Panel** and create a bigger **Workspace**, hover over the Panel adjustment and click when it changes colour. Click and drag the dividing line to re-size the panel.

Items in the **Navigation Panel** open in the **Workspace:**

The **Asset Management** modules will open in a new tab in the **Workspace**.

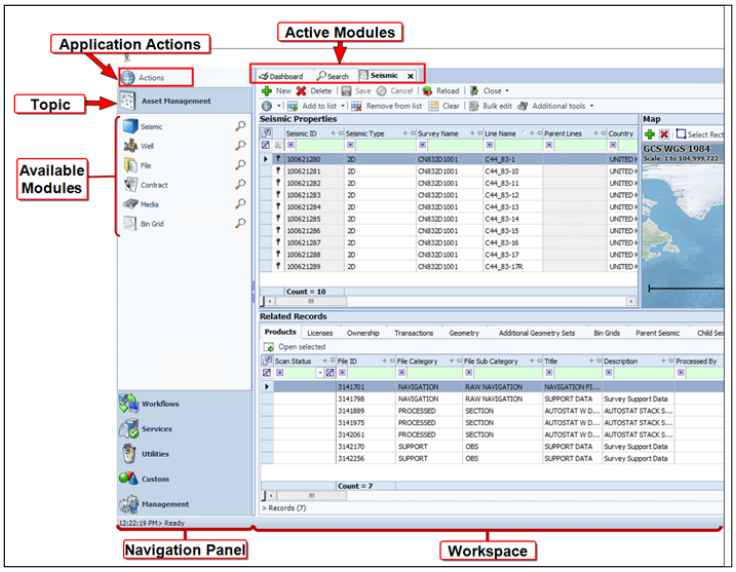
The **Workflows** search results display in the **Search** tab to view before opening. Double-click an item in the results to open the information within the associated **Workflows** module.

Each module displays information in a grid format with particular features and actions relevant to your workflow. The **Seismic** , **Bin Grid** and **License** modules include an interactive map and other visual elements.

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2.2 Introducing Desktop layout

The Desktop screen is divided into two panes: the **Navigation Panel** and the **Workspace**.



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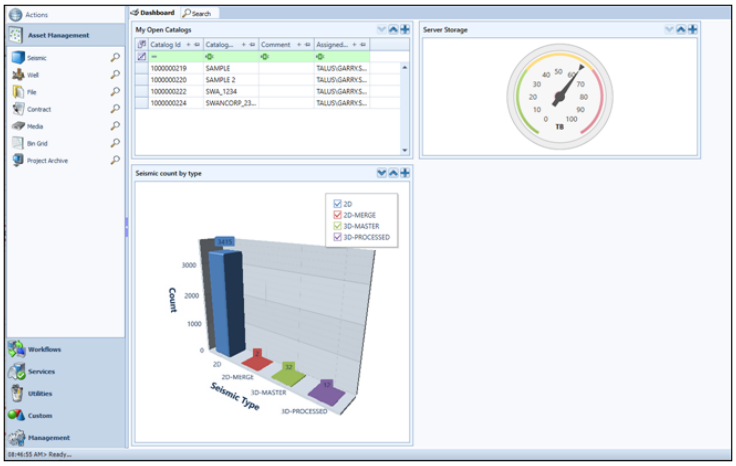
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2.3 Use Dashboard

When you open Exploration Archives the first thing you see is the **Dashboard**. The Dashboard uses data visualizations, called **widgets** which display an overview of the data or data events relevant to your workflow and business responsibilities.

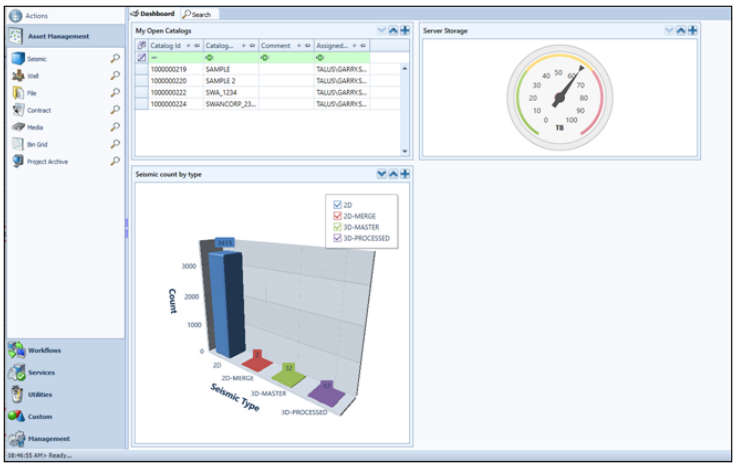


Customized widgets can be created by your administrator based on objectives and requests.

The dashboard normally includes shared elements ensuring that everyone receives the same metrics and analysis for making decisions and managing data with consistency.

The widgets combine data from different areas of Exploration Archives and present a single view of your relevant information by taking complex data sets and converting them into bar charts, line graphs, gauges and tables.

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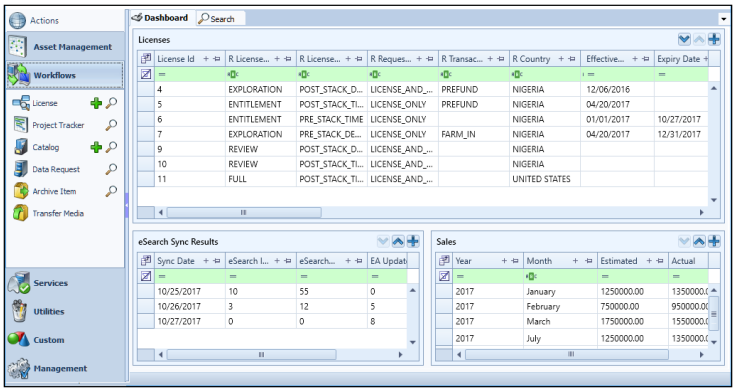


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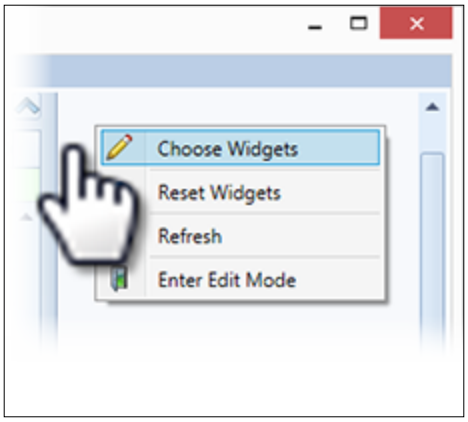
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Customize your Dashboard

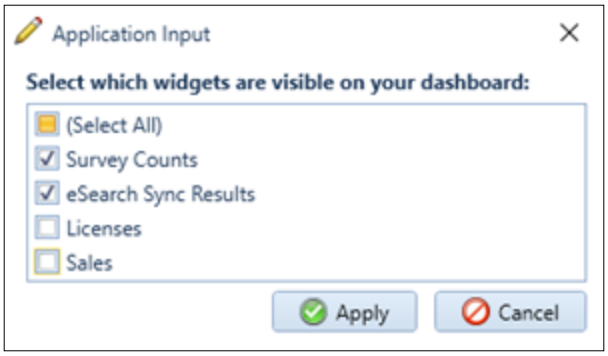
The initial view of your Dashboard is the default set for your user group. However, you can customize the dashboard to display the widgets in a way that is best suited for you.

Selecting widgets to display:

1. Use the widget selector to view the list of widgets available and select which ones to display on your Dashboard. To open the selector, right-click on an empty space in the Dashboard.



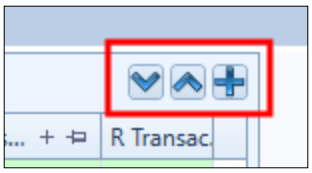
2. Click to check or clear the widgets to display and click **Apply**.



Resizing widgets:

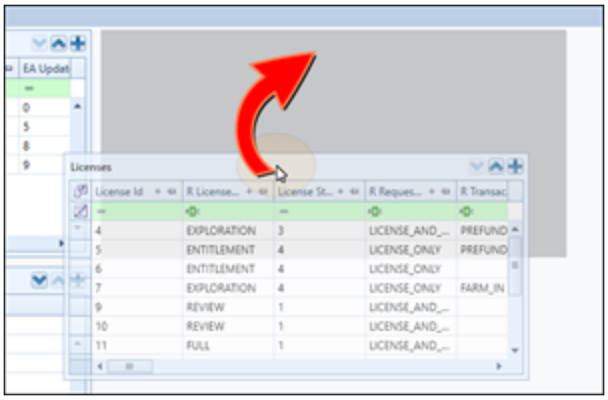
To re-size a widget, use the **Increase Size** and **Decrease Size** button in the upper right corner of a widget. The widgets have four incremental size options.

The Plus sign maximizes the widget.



Moving widgets:

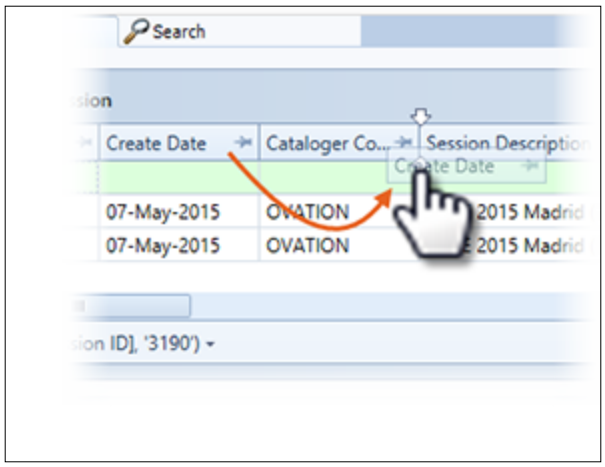
To move widgets around, click on a widget and drag to a new position. A grey outline indicates an available spot for repositioning the widget.



Organizing widget grids:

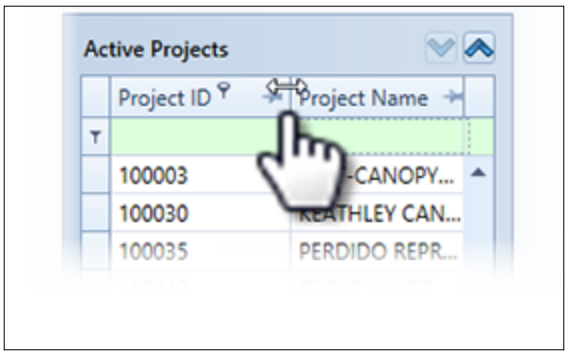
The grids in widgets include similar functionality as other grids in Exploration Archives for optimal data display.

- You can move the location of a column by clicking the column header and dragging it to a new location. Release the column when a pair of arrows display to indicate the placement location.

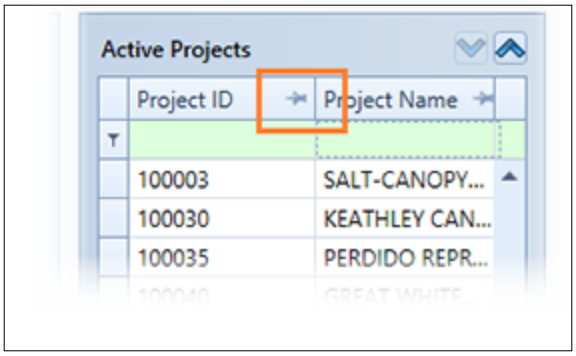


- To adjust the column width, hover over the right-hand edge of the column header until a double-sided arrow displays.

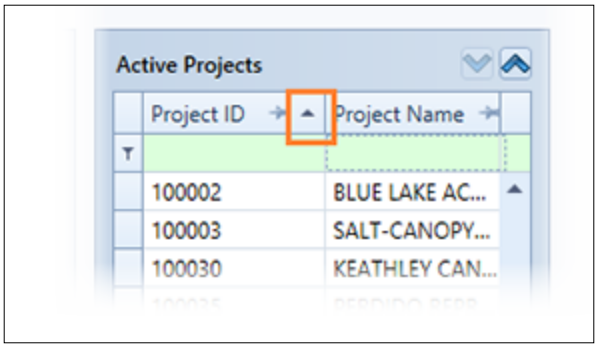
  Click and drag to adjust the column width.



- To pin a column to the left, click the pin button in the header row. This locks the column to the left side of the grid. Repeat if you want to pin multiple columns to the left. The column(s) remains in place when scrolling horizontally. Click the pin again to unpin.



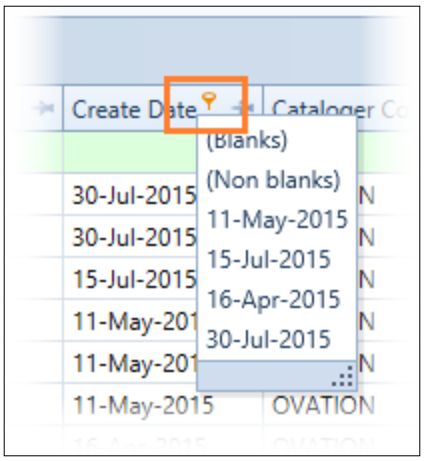
- To sort ascending or descending click the column header to activate the ascending and descending sort option. Click the arrow to toggle between ascending and descending.



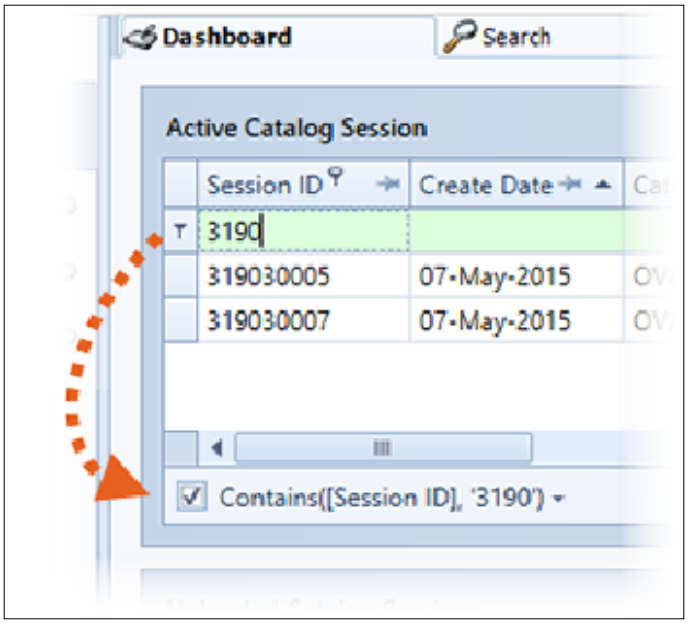
Filter widget data:

Use the filter features to quickly locate target data.

- To select a particular value for a column category, click the filter button and select a value from the list. Only rows with the selected value will display in the grid.



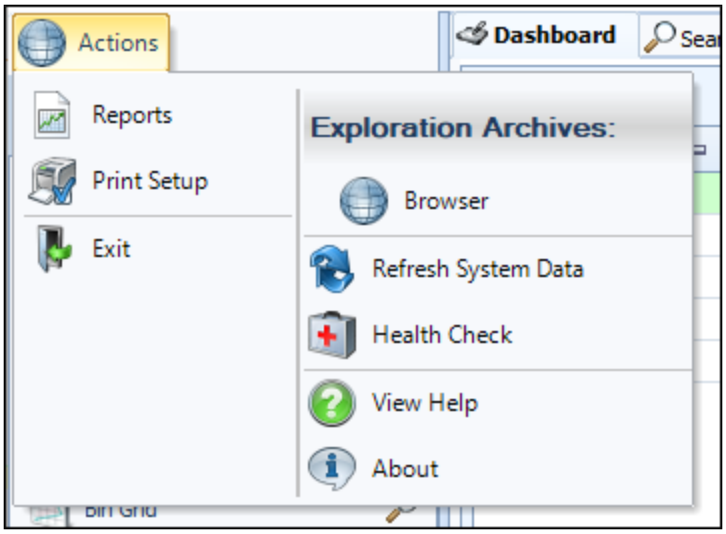
» The first row in the grid is the manual filter row. Type in a value to filter and the grid will begin to filter the data as you type. In this example, typing "3190" displays only items that have a session ID starting with "3190".
The active filter information shows at the bottom of the widget for reference. If the data displayed is not as expected, check to see if the filters are influencing the data being displayed.



2.4 Actions menu

The Actions menu contains commands that are used within the application, with no association to a specific module.

Click **Actions** to display the available commands.



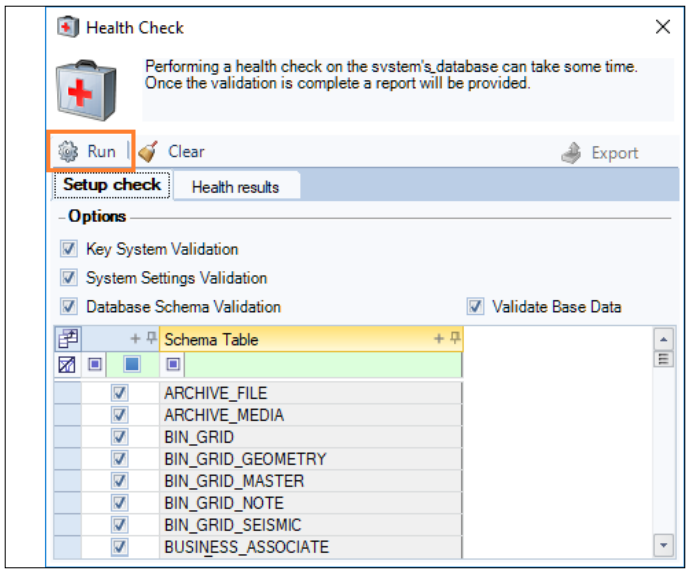
- **Reports**: Opens the **Reports** module in the Workspace. The reports available to you are configured by your administrator.
- **Print Setup**: Opens the **Print** configuration window to set printing specifications.
- **Exit**: Click to close Exploration Archives.

> **Tip:**
> Alternatively, you can click the “X” in the upper right corner of the application.

- **Browser**: Opens the online version of Exploration Archivesin a new browser window.
- **Services**: Opens the **Services** extension. This opens a web page that shows the results of services.
- **Refresh System Codes**: Refreshes the content displaying in the application to reflect the content in the database.

> **Note:**
> Each time you open Exploration Archives, the system codes refresh automatically. However, if your system administrator makes changes to the system codes while your application is open, you must perform a refresh for your current session to display the changes.

- The **Complete** dialog opens when the refresh is complete.
- **View Help**: Opens the support site in a new browser window.
- **About**: Opens an information box that displays the Data Server source and the application version number.
- **Health Check**: Opens the **Health Check** tool to validate the database and settings.



In the **Health Check** window, select the validation option(s) in the **Options** area. By default, all schema tables are selected. Uncheck any schema tables from the list to exclude from the validation. Click **Run**. The validation process begins. When complete, the report displays in the **Health results** tab. The **Export** option is available to export the report to Excel.

2.5 Navigation panel

The Navigation panel is where you load and display the different modules available in Exploration Archives.

The panel is divided into two sections:



1. The Categories each module falls under. Each Category can be expanded by clicking on them.
2. Under each category are the Modules available to you.

> **Note:**
> The functions available depend on your security level and your company configuration.

Click a category to display the modules.

The possible categories and their modules include:

Asset Management
- Seismic
- Well
- Product
- File
- Contract
- Media
- Bid Grid

Workflows
- License
- Project Tracker
- Catalog
- Data Request
- Archive Item
- Transfer Media
- Seg-Y Scan Queue

Services
- Policing
- Metrics
- Maintenance
- Messages
- Notifications

Utilities

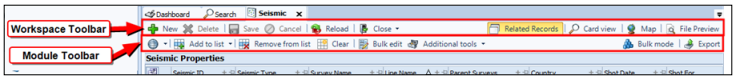
Custom

Management

- Seismic Merge
- Business Associate Sync
- File Synchronize
- Seismic Migration
- SEG-Y Duplicate Scan
- License Compare
- Directional Survey
- Lists
- Business Associate
- User Security
- Searches & Reports
- System Settings
- Audit

2.6 The toolbars

There are two types of toolbars in the **Workspace** ; the **Workspace toolbar** and the **Module toolbar**.



The Workspace toolbar has commands that affect the Workspace. The Workspace toolbar contains commands common across all modules with select commands for modules.

The Module toolbar typically has commands that affect the particular module that is open. Depending on the module, these commands can be either grid related or workflow related. The **Additional tools** menu will populate with commands that are specific for each modules:

Workspace Toolbar



New: Adds a new row to the grid. Not available in the **File** and **Media** modules.



Delete: Deletes the selected row(s). Not available in the **File** and **Media** modules.



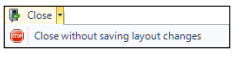
Save: Saves all changes.



Cancel: Reverts unsaved changes.



Reload: Refreshes the details in the current grid.



Close: Closes the current module tab. If you have unsaved changes, you will be prompted to save your changes.

Close without saving layout changes: Closes the current module tab without saving new display settings created during the session.



Related Records: In the **Seismic** module, opens the related records of the selected seismic record.



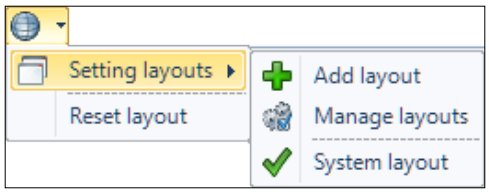
Card view: In the **Seismic** module, displays the selected seismic record in a single page view (instead of showing all records in a grid view).



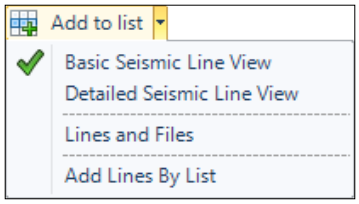
Map: In the **Seismic** module, opens the **Map**.

Module Toolbar

- **Setting layouts**: Opens options for managing custom layouts. Select the columns to display, set column widths, adjust panel sizes and other layout settings, and save your layout for future access.



- **Add to list**: Add items to the list using a quick-access search option. Click the down arrow to view the available searches.



- **Remove from list**: Removes selected rows from the list.



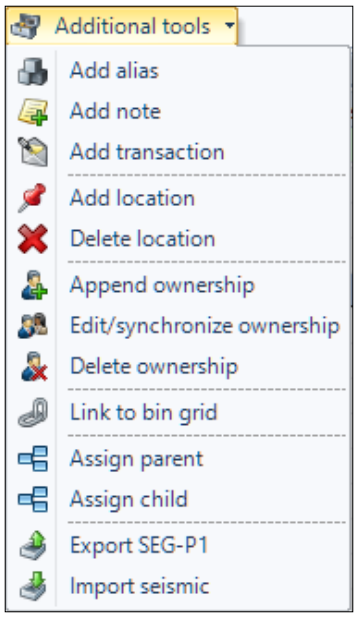
- **Clear**: Removes all rows from the display grid.



- **Bulk edit**: Opens the **Bulk edit** tool for simultaneously editing metadata in multiple rows.



- **Additional tools**: The commands available will vary depending on the active module. This example displays the Additional tools available for the Seismic module.



- **Bulk mode**: Allows the ability to select multiple records in the grid.

  With **Bulk mode** turned on, you can edit multiple records using the **Bulk Edit** command.

  With **Bulk mode** turned off, the **Related Records** window display only for the selected item in the grid.

  Note: **Bulk mode** is not available with the **Bin Grid** module.

- **Export**:Exports the grid in Microsoft Excel format.

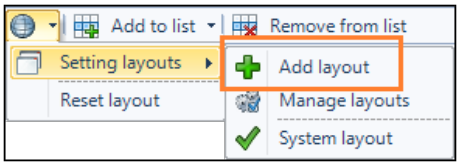
2.7 Customize grid layouts

Throughout Exploration Archives data details display in a grid format. The grids share common features for customizing the layout and display. The changes you make save to your profile for the next time you open Exploration Archives.

In the **Asset Management** modules, you can save multiple custom grid layouts using the **Setting Layouts** feature. Saved layouts are available in the **Setting Layouts** for you to quickly change to a preset layout.

Use the features described in this section to customize your grid layout. If you want to work with more than one grid layout, save your changes as a custom layout to access at anytime.

To save a custom grid layout, open the **Setting Layouts** menu and click **Add Layout**. When prompted, enter a name for your layout and click **OK**. The new layout is available in the **Setting Layouts** menu.



2.8 Save Custom Layouts

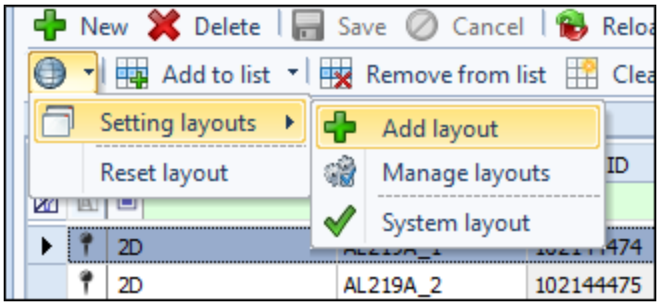
Select Version of EA Desktop:

There may be times where you want to look at different types of data contained in a module with different views. Instead of loading a data set and constantly rearranging the grid to have the relevant columns displayed, it's possible to save multiple layouts within a module and switch between them as needed.

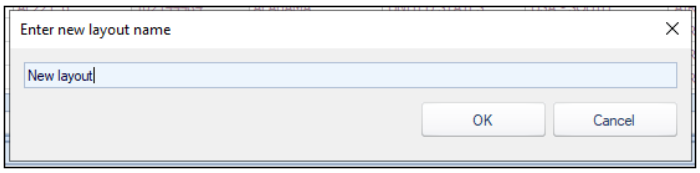
As An Example:
In **Seismic**, you may want to examine 2D data with certain columns of the grid visible and in a specific order and possibly have the displayed data grouped by specific columns.
When you are looking at 3D Data, you need to have different columns in the grid visible the grid in a completely different order.
You can create a layout for each type of data set and switch between them as required.

To save a custom grid layout:

1. Open the **Setting Layouts** menu and select **Add Layout**.



2. When prompted, enter a name for your layout and click **OK**.



3. After you have added the layout, adjust the window and grid settings to your preferred view. The layout will be saved automatically.

Note:

There are some things to remember when saving layouts:

- **Layouts are not bound to data sets**. You can apply a layouts will be applied to any data currently in the grid.
- **Window layouts are saved**. If you have arranged the panes in a workspace, those positions will be saved
- **The Group by Panel setting is saved**. If you group data with the Group By bar then that will be saved in the layout.

To recall a custom view, select the layout from the **Settings Layout** menu.

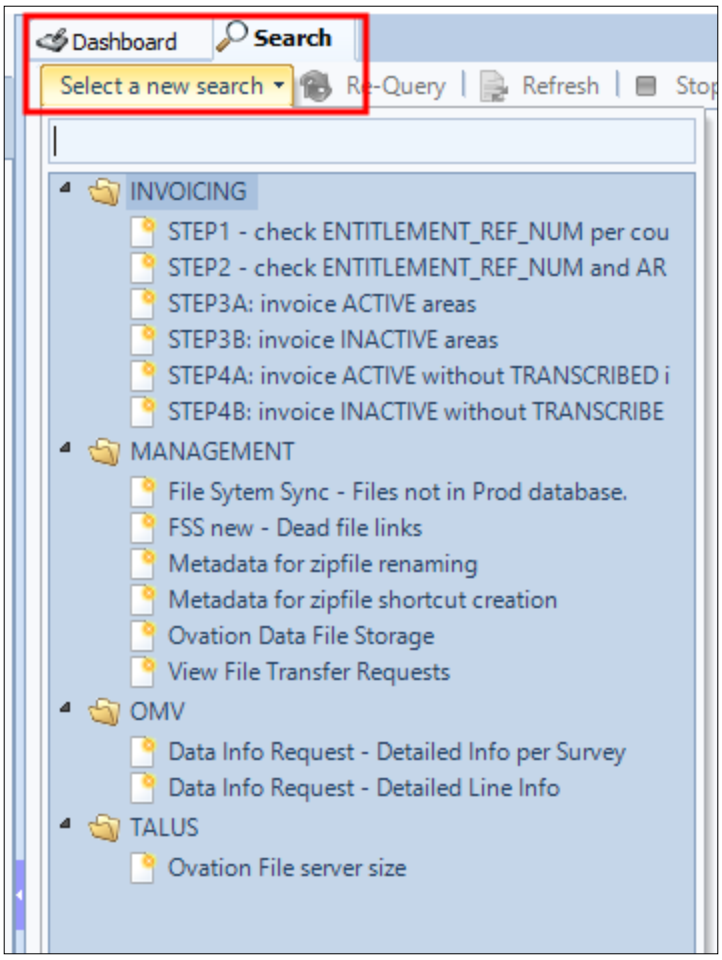
2.9 Search records

Exploration Archives provides detailed information about your seismic records to help you make decisions before requesting or editing data.

The key areas for searching data are in the **Search** module and the **Asset Management** modules: **Seismic**, **File** and **Media**.

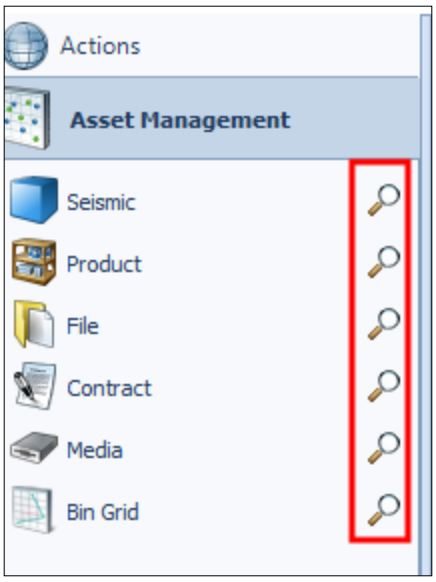
The information that displays in the **Search** results are read-only. The results from the **Asset Management** searches populate in the modules with the ability to manipulate data and access to related records .

To search from the **Search module** in the Workspace, click **Select a new search** and access your custom searches.



Note:
Your administrator creates the custom searches and determines the details to display in the results.

To search from the **Asset Management** modules, click the search icon next to the **Seismic**, **File** or **Media** module in the Navigation panel. The details that display in these results are controlled by the module settings.



Each search option has unique capabilities. As you use the different searches, you will become familiar with the various methods of searching and the benefits of each.

For more information on searches review these topics:

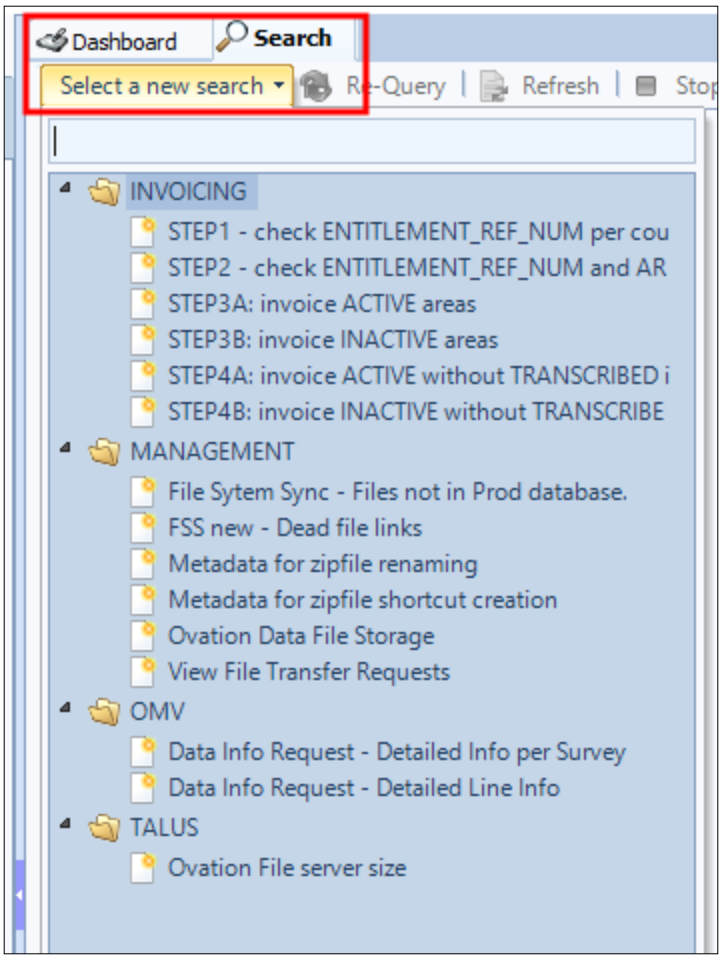
1. "Search seismic " on page 29
2. Searching files
3. Searching media
4. "Use custom searches" on page 24

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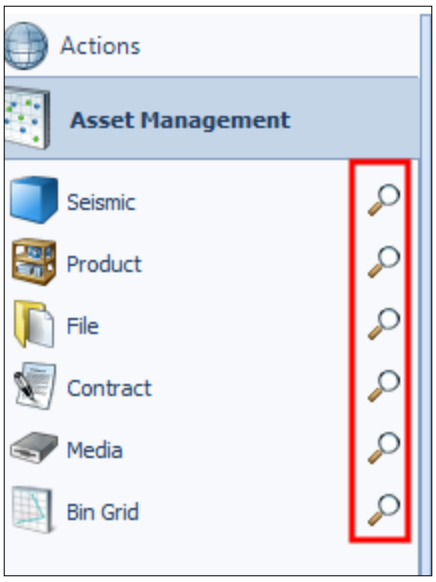
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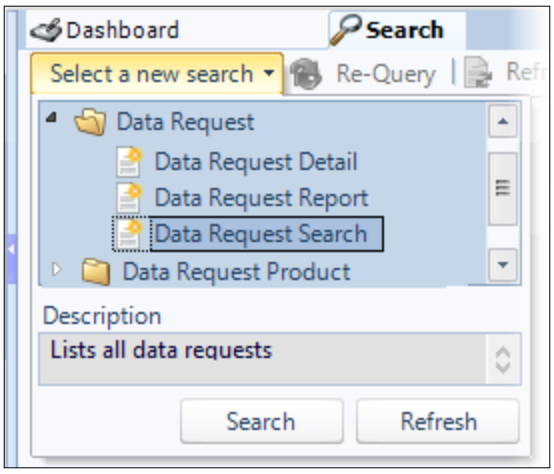
1. "Search seismic " on page 29
2. Searching files
3. Searching media
4. "Use custom searches" below

Use custom searches

The **Search** module offers custom searches specific to your company workflows. Your administrator configures the searches with filtered fields to give targeted results.

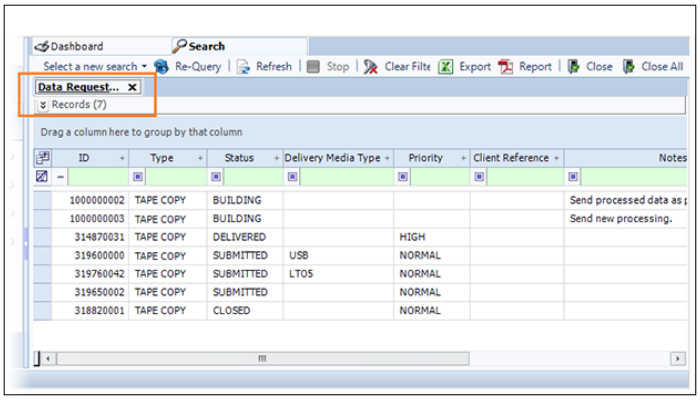
To use your custom searches:

1. Click the **Search** tab in the Workspace.
2. Click **Select a new search** to populate the list of custom searches.
3. Select your target search and click **Search**.



The search window opens.

4. Enter your search criteria for the relevant filters.
   The results open in a new tab within the **Search** module.
5. To open a particular record, double-click on a row. The record will open in the associated module.



Search from Excel

When searching for records that have been provided to you in an Excel workbook, There are 2 methods of entering data into the search window :

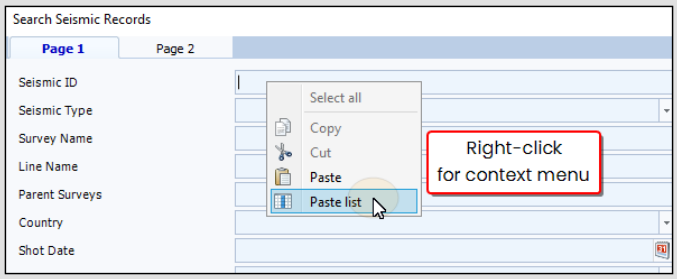
Paste:

You can copy values from a cell in the Excel workbook into a field in a search window.

Paste List:

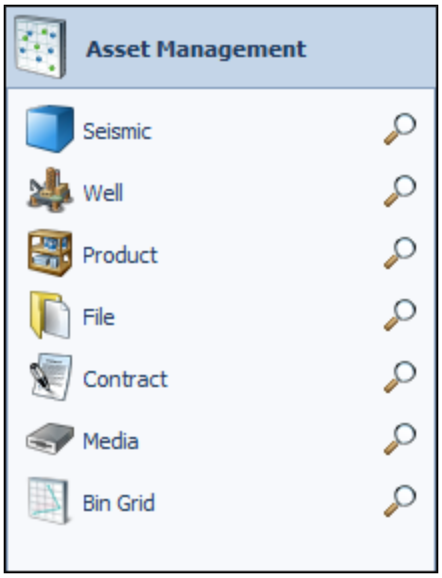
This allows you to select a column or a RANGE of cells from a workbook and have the cell range converted into a comma separated list in a field.

As An Example:
You need to search for a large number of seismic IDs you received in an Excel workbook. Copy the Seismic ID column, and use Paste List in the Seismic ID field in the search window. The values from the column will be pasted as a Comma separated list and all the values will be searched.



3.0 Asset Management

Exploration Archives provides a variety of features and processes for managing your data assets.



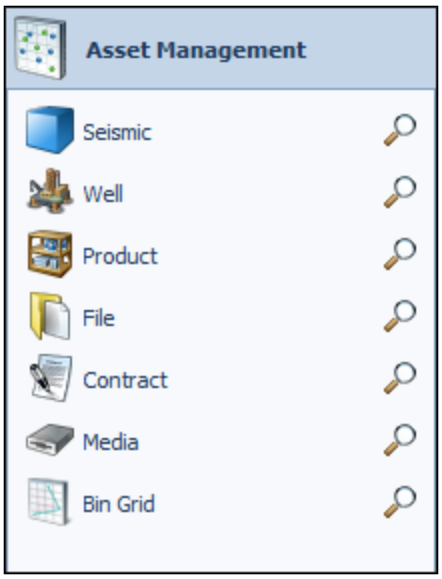
Depending on your role, you may use one or all of the modules when managing your assets. Your administrator sets your access to modules that are relevant to you.

The **Asset Management** modules include:

- **Seismic** : Add seismic surveys, associated metadata, geometry and Related Records
- **Well**: Manage well information
- **Product**:
- **File** : Add seismic survey files
- **Contract**: Manage contract-related files
- **Media** : Add seismic survey media
- **Bin Grid**: Create, edit and manage bin grids

Each module has a context menu with base and module-specific actions. To access the context menu, right-click on an item in the grid. The base actions available across all modules include export, copy and paste, and data display (show by) actions. For detail regarding the module-specific actions, refer to the particular support material for each module.

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3.1 Seismic

New in this version:

- Added a Bulk Mode for the Contracts Tab.
- Associated Bin Grids are now highlighted

New in this version:
Added a tool to allow the export of geometry (and alternate geometry) to SHP file. This is also available for SEG-Y files that have geometry.

New in this version:
Added tools to link and unlink a Seismic Transaction to and from a Contract.

The **Seismic** module displays the details of your seismic data. Users with security permission can add new seismic to the database and manage the links between the seismic records, navigation, and the associated files and media.

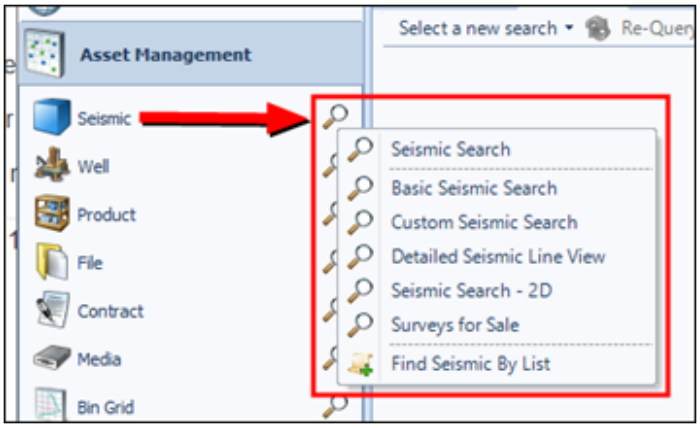
Search seismic

The reasons for searching seismic records are: to view information, edit information or add items from the grid to a **Data Request**.

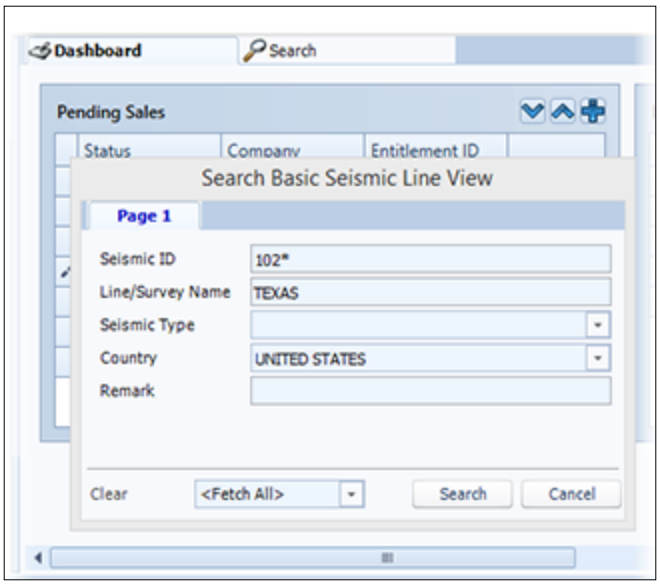
For a basic view of seismic records, click the **Search** module tab and use the **Select a new search** option. The results display within the **Search** tab. For more details, refer to "Use custom searches" on page 24.

To manipulate data or collect more detailed information, use the module search next to **Seismic** in the navigation panel. This option opens the results within the **Seismic** module.

1. Click the Search icon next to Seismic in the Navigation panel.



   You will see a sub-menu listing all the search options.
2. Select the appropriate search you need and a search window opens.



Note:
The search fields will vary depending on the search profile.

3. Enter your filter values and click **Search**.

> **Tip:**
> If you are working a particular area and will be looking up the same IDs over and over, using **Find Seismic By List** can populate the grid with the contents of a pre-compiled list. To create a list please refer to: "Create a new seismic list" on page 481

The results open in the **Seismic** module. Scroll through the grid to view record detail and associated information.

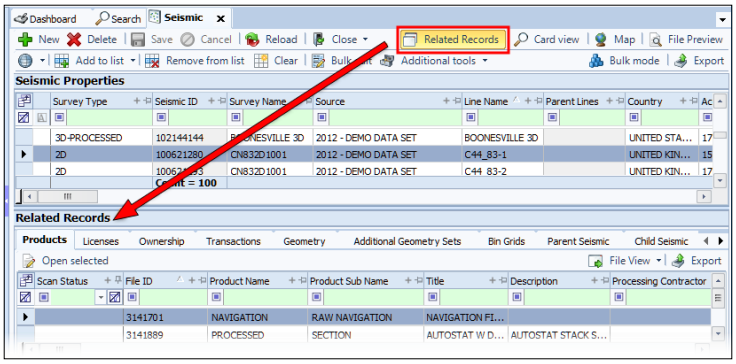


Export: The **Export** function exports grid information to various document types, including Excel®.

View related records

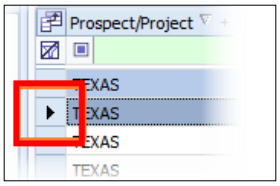
The **Seismic** module includes a **Related Records** panel for viewing and accessing additional information.

To open the **Related Records** panel, click **Related Records** in the menu.



The **Related Records** panel opens in the lower portion of the **Seismic** module. The associated information displays according to the seismic item that is selected as active in the grid.

A row that is "active" in a grid displays an arrow in the leading column.



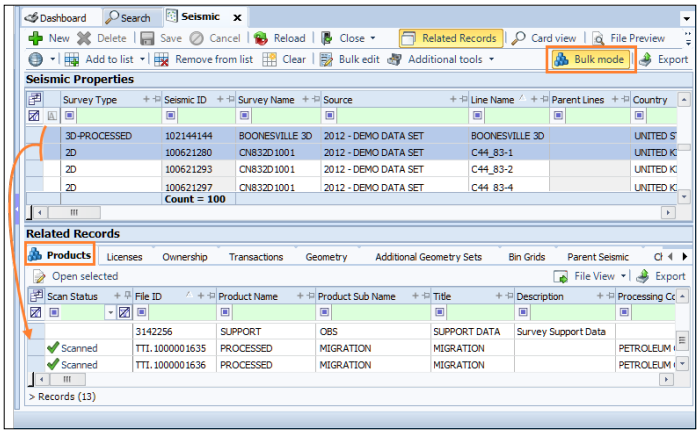
Some tabs in **Related Records** are able to display information for more than one selected record. To display information for multiple items, use **Bulk mode**.

When the **Bulk mode** is turned on, the associated information for each selected item displays in the **Related Records**, regardless if the selected item is "active". With **Bulk mode** turned on, a bulk icon displays in tabs that have the capability.

To use Bulk mode...

1. Click the **Bulk mode** button in the menu.
2. To select multiple consecutive items in the **Seismic** grid, click and drag to select.

   To select a large number of consecutive rows, click the first row, hold Shift and select the last row.
   To select multiple random rows, hold Ctrl and click each row to select.
   The associated records for each selected row displays in the **Related Records** tabs.



The **Related Records** include tabs dedicated to particular categories of metadata. Browse the areas in the tabs to view the related information.

To open an item displayed in **Related Records**, click to select and click **Open selected** (if available).

The tabs in **Related Records** for the **Seismic** module include:

- Products
- Licenses
- Ownership
- Transactions
- Geometry
- Additional Geometry Sets
- Bin Grids
- Parent Seismic
- Child Seismic
- Wells

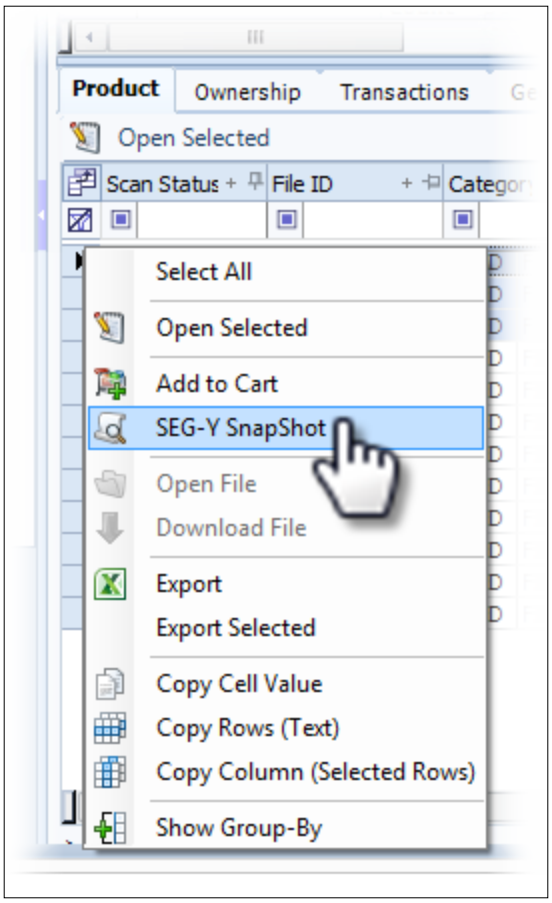
- Aliases
- Locations
- Notes
- Projects
- Data Request History
- Catalog
- Audit

Viewing files with SEG-Y snap shot from Product tab

In **Related Records**, files that appear in the **Grid** with a **Scanned** status are available for viewing in **SEG-Y SnapShot**. To scan files with a **Not Scanned** status, or to re-scan files marked as missing data or navigation, select the files in the grid and click **Open Selected**. With the items open in the **File** module, refer to "Adding files to SEG-Y Scan " on page 185

To view files in **SEG-Y SnapShot**:

1. Use one of the following methods to select **Scanned** files for viewing:
   - Click to select one row in the **Grid** grid.
   - To select multiple individual rows, press **Ctrl** while clicking to select.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
2. Right-click on a selected row and select **SEG-Y SnapShot** in the context menu.



The **SEG-Y SnapShot** window opens.

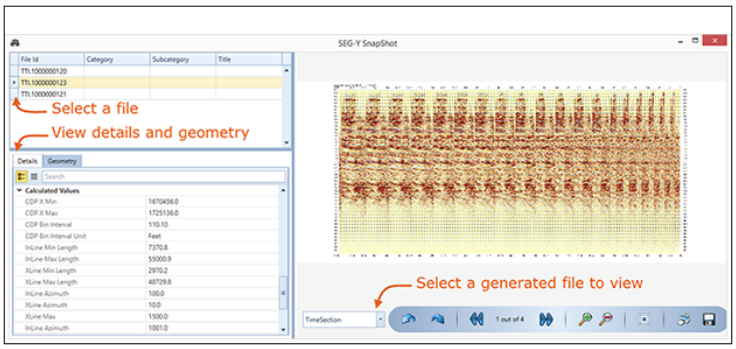
The grid in the upper left displays the files you selected for viewing. Click to select a file to view.

The lower left grid displays the **Details** tab and the **Geometry** tab. Click a tab to view the associated information.

The panel on the right displays the generated snapshot files:

- Time Slice
- Live Trace Outline
- Time Section
- EBCDIC
- Report

Click the drop-down to select a snapshot view. Use the navigation bar to browse, print or save the files.

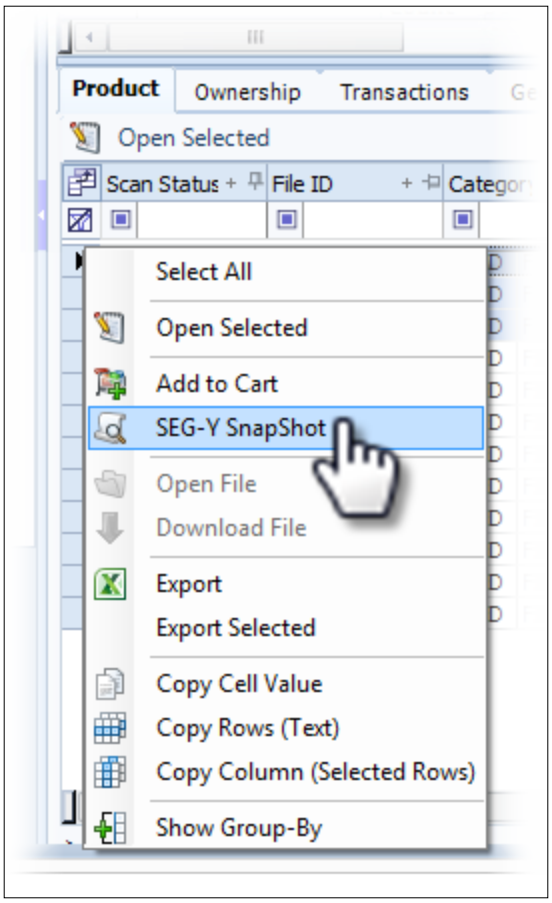


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The "snapshots" of your SEG-Y are compressed replicas for a quick view of time slices, live trace outline, time section and the EBCDIC header detail.

To view files in **SEG-Y SnapShot**:

1. To locate SEG-Y files in the **Grid** grid, use the filter row of the **Location** column and enter "**.sgy**".
2. Use one of the following methods to select **Scanned** files for viewing:
   - Click to select one row in the **Grid** grid.
   - To select multiple individual rows, press **Ctrl** while clicking to select.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
3. Right-click on a selected row and select **SEG-Y SnapShot** in the context menu.



The **SEG-Y SnapShot** window opens.

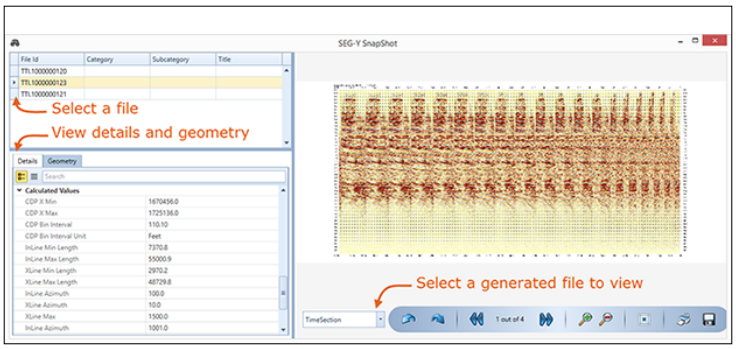
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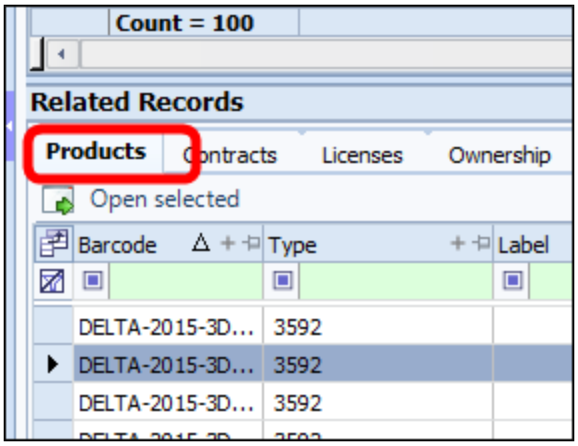
- Time Slice
- Live Trace Outline
- Time Section
- EBCDIC
- Report

Click the drop-down to select a snapshot view. Use the navigation bar to browse, print or save the files.

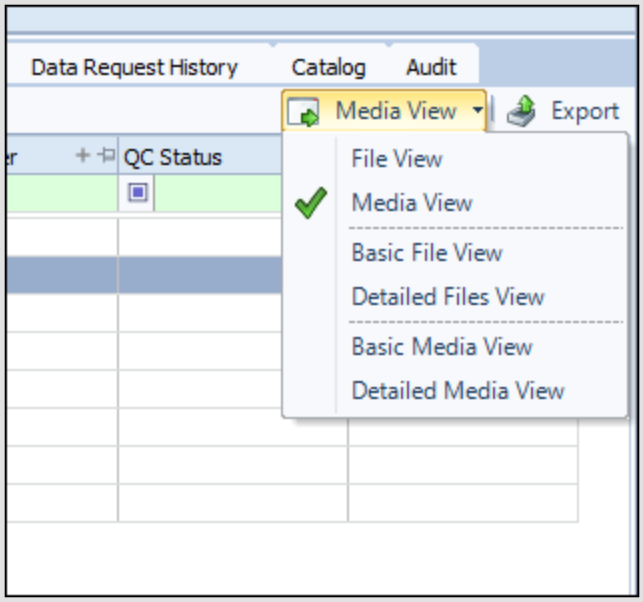


Open a related record in File or Media

In the **Seismic** module, the associated products display in the **Product** tab of the **Related Records** panel.



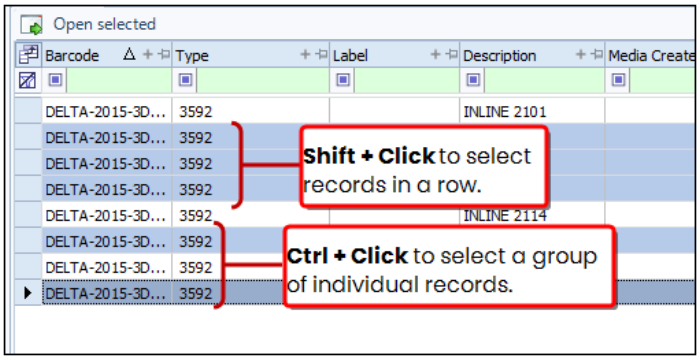
Tip:
You can filter the view in the Products tab by adjusting the **Media View** in the related records toolbar in the right corner. This will allow you to select what products are displayed: Files or Media.



To view the detailed information for a product, you can open the product(s) in the **File** or **Media** module.

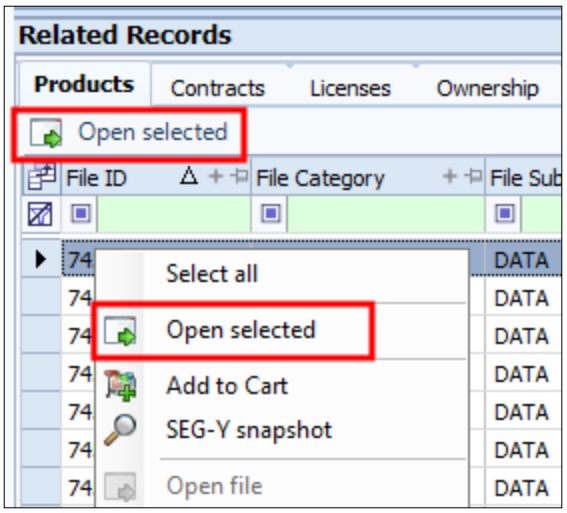
To open a record in the **File** or **Media** module:

1. Click on the record in the **Product** tab of **Related Records**.
   To select more than one item, hold down **Shift** or **Ctrl** and click on the items.



2. Click the **Open selected** button above the grid.

   Alternatively, right-click on the selected row(s) to open the context menu and select **Open selected**.



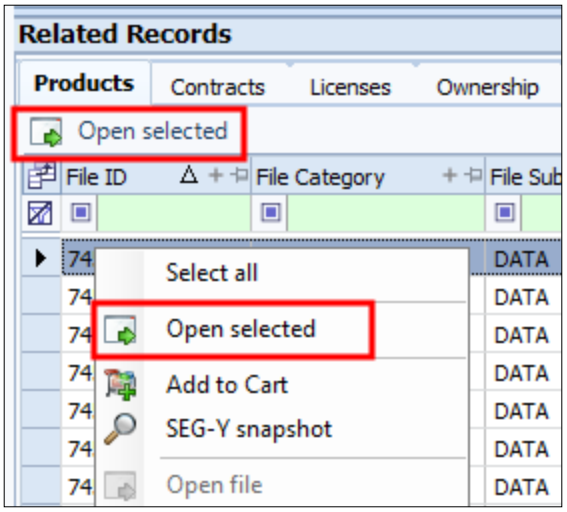
The selected item(s) open in the specific module.

In the **Seismic** module, the associated products display in the **Product** tab of the **Related Records** panel. To view the detailed information for a product, you can open the product in the **File** or **Media** module.

To open a record in the **File** or **Media** module:

1. Click on the record in the **Product** tab of **Related Records**.
   To select more than one item, turn on **Bulk mode** and select multiple records.
2. Click the **Open selected** button above the grid.

   Alternatively, right-click on the selected row(s) to open the context menu and select **Open selected**.

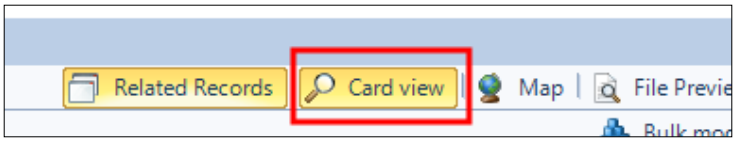


The selected item(s) open in the specific module.

Using the Card view

Where the grid view displays multiple data records, **Card View** offers a compact view of data from a single row.

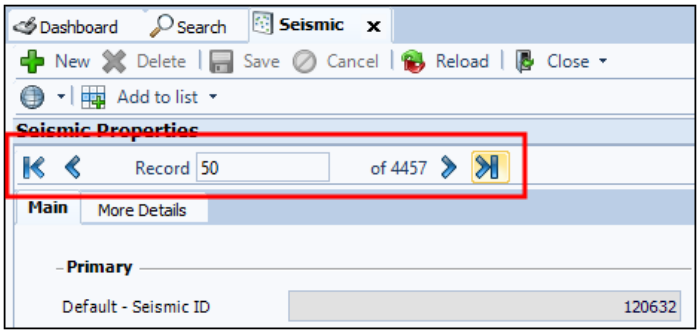
To open the single item view, select a target row in the **Seismic** grid and click **Card view**.



To open **Card View**:

1. Select a row in the grid.
2. Click **Card view** to toggle the view on.

   The highlighted record opens with the details displayed in the workspace. The Information is broken into two tabs; **Main** and **More Details**.
3. You can navigate between records by navigation arrows on the toolbar.

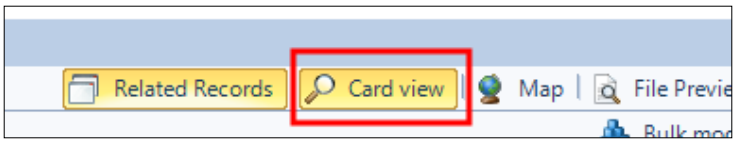


4. To edit details in a record, fill in the appropriate fields on the card.

   Note: Depending on the purpose of the field and your security permissions, some fields may not be available for editing.
5. Once you have edited the information in the card, click **Save**.
6. To return to grid view, click **Card view** a second time to toggle it off.

Where the grid view displays multiple data records, **Card View** offers a compact view of data from a single row.

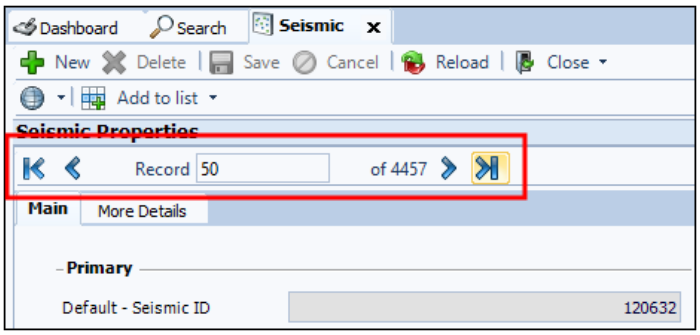
To open the single item view, select a target row in the **Seismic** grid and click **Card view**.



To open **Card View**:

1. Select a row in the grid.
2. Click **Card view** to toggle the view on.

   The highlighted record opens with the details displayed in the workspace. The Information is broken into two tabs; **Main** and **More Details**.
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6. To return to grid view, click **Card view** a second time to toggle it off.

Create a reserve list from Seismic

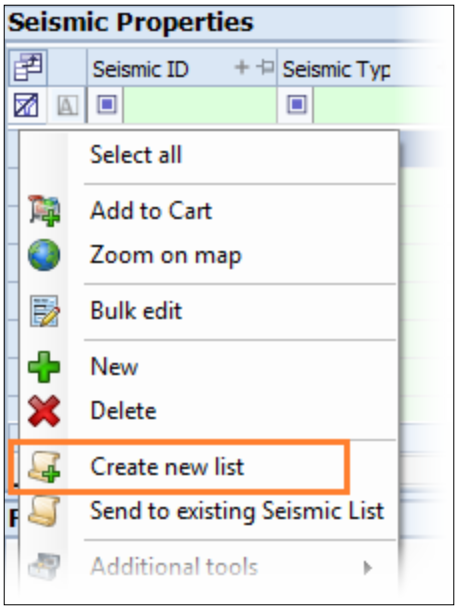
The **Lists** tool is for compiling a list of seismic, file or media items that will be part of a future workflow. The items you organize into a reserve list are stored and become accessible from the **Lists**, **Seismic** and **Catalog** modules.

In the **Lists** module, you can create a new list of items or access an existing list to continue adding or removing items as needed.

After searching in the **Seismic** module, you can send items from the seismic grid to a new or existing list.

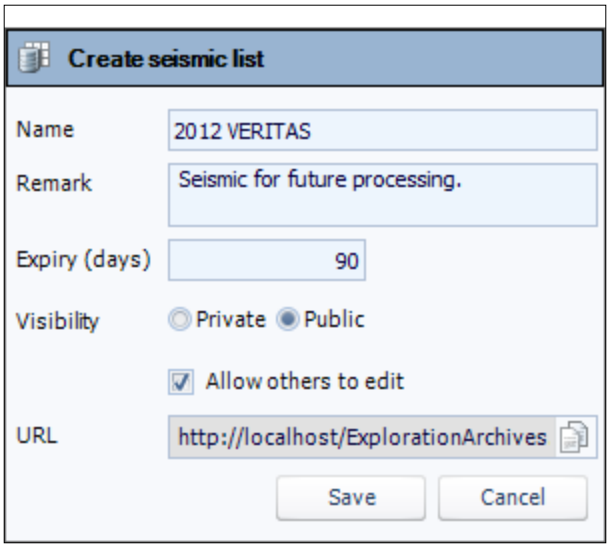
To add items to a new list...

1. Select the target items in the seismic grid and right-click to open the context menu. Click **Create new list**.



   The **Create seismic list** window opens.

2. In the **Create seismic list** window, enter the detail for each field:



   - **Name**: Enter a relevant name or number.
   - **Remark**: Enter a description with useful information about the list.
   - **Expiry**: Enter the number of days to maintain the record as a list. On expiry, the list will delete.

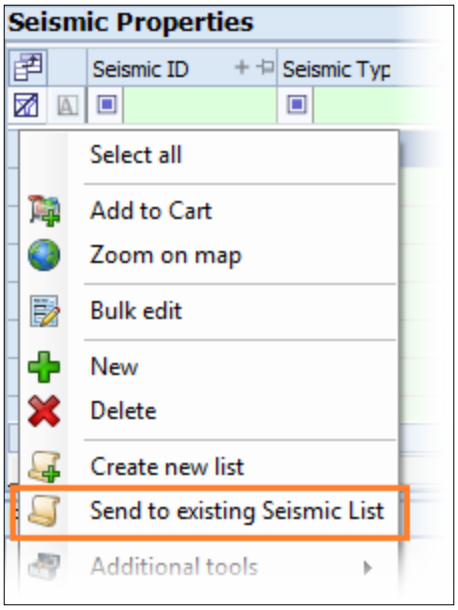
     Note:
     If you don't want the list to delete, set the **Expiry** to zero.

- **Visibility**: set to **Public** and **Allow** others to edit.
- **URL**: This field is displays the URL to access the seismic list in EA Browse. Click the **Copy** icon to copy the URL to your clipboard.

3. To save the list and close the window, click **Save**.

To add records to an existing list...

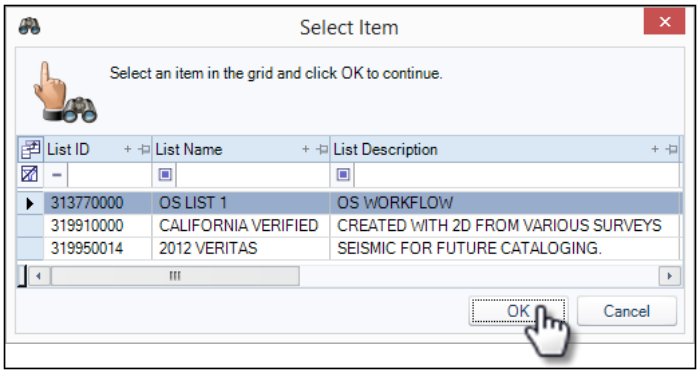
1. Select the target records in the seismic grid and right-click to open the context menu.
2. Click **Send to existing Seismic List**. The search window opens.



To find the list, enter search criteria and click **Search**.

> **Note:** To populate all lists, leave the search criteria blank and click **Search**.

3. The search results will populate in the **Select Item** window.



4. Select the target list then click **OK**. The records will be added to the selected list and the window will close.

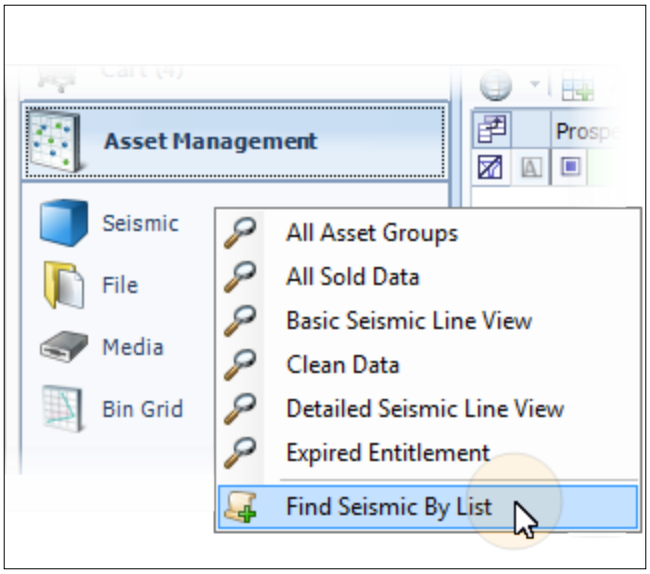
Search seismic by list

One of the search options available for the **Seismic** module is **Find Seismic By List**. This search function will open the **Seismic** module and populate the grid with records from a predefined list you select.

> **Note:**
> If the Seismic module is already open, the items from the list will added to the **Seismic Properties** grid.

To search seismic by list:

1. Click **Search** next to **Seismic** in the Navigation panel and select **Find Seismic By List**.



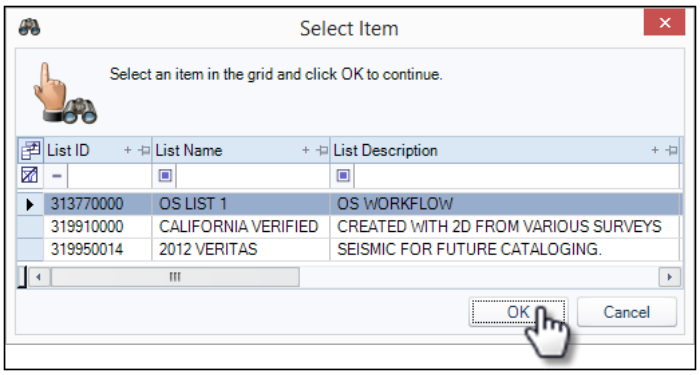
The **Search Entity List Records** window opens.



2. Enter your search criteria then click **Search**.

> **Tip:**
> If you leave all the search criteria empty then click **Search** All lists will display.

The search results appear in a new window.

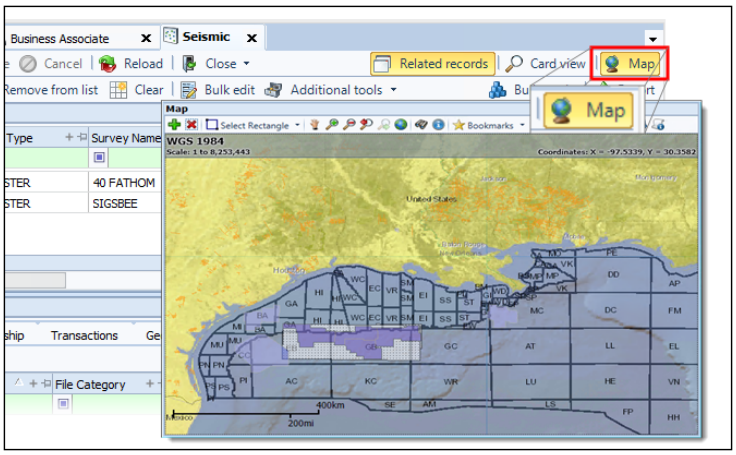


3. Select your target list then click **OK**.

Use the map in Desktop

The **Seismic** module can display your records on a map. You can search the map to locate seismic and add to your seismic grid.

To open (or close) the map view, click **Map** in the menu bar.



To adjust the size of the viewing panel, click and drag the bar that divides the map view and the **Seismic** grid.

To view the **Map** panel in a separate window, or move to an alternate monitor, click and hold in the header of the panel and drag to float.

Using the map toolbar

The **Map** includes a variety of navigational and selection tools for searching and viewing your data.

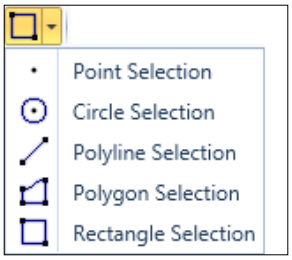
To activate a tool, click the item in the toolbar.



Add: Use the **Select** tool to select seismic on the map. Click **Add** and the seismic adds to the **Seismic** grid.



Deselct: Deselect all features that are currently selected on the map.



Select: Click to open the selection options. Using the selection tool, click on, or draw around, items on the map to select.



Pan: Click and drag to pan the map. Double-click to zoom in slightly.



Zoom in: Draw an area on the map to zoom the view to the specified extent.



Zoom out: Draw an area to quickly zoom out.



Previous extent: Click to go back to the previous extent.



Next extent: After clicking to load to a previous extent, click **Next extent** to go forward again.



Full map: Click to expand the view to the full extent of the map.



Search: Click to open a Search window. For more information see "Search the map " on page 50.



Identify: Identify the features of particular items on the map.

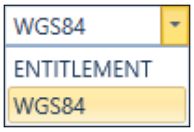
Click to activate the **Identify** cursor  . For more information see "Identifying features " on page 51.



Bookmarks: Create or select a bookmark for quick navigation to map locations.



Layers: Click to open the layers legend. In the layers legend, select and deselect to display different map layers. The map layers you select save to your profile for the next time you open the **Map**.



CRS: Specifies the coordinate reference system (CRS) for the map. If more than one CRS is configured, a drop-down menu is available with other options.



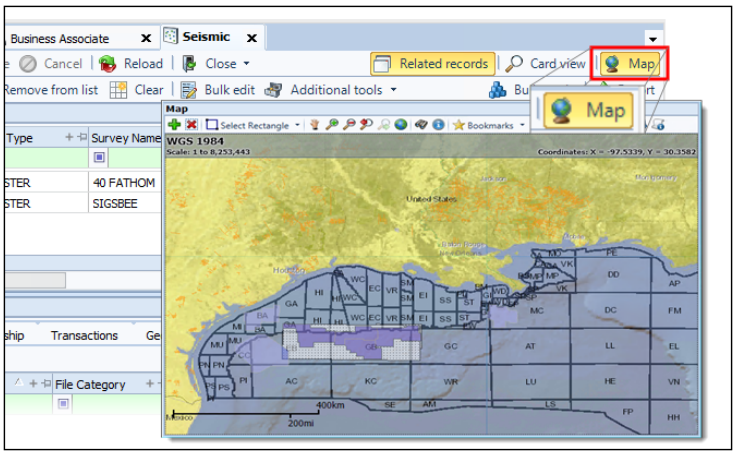
Refresh: Click to refresh all map layers and data sources.



Log: Click to open a log of your actions. This log is useful for troubleshooting map issues.

The **Seismic** module can display your records on a map. You can search the map to locate seismic and add to your seismic grid.

To open (or close) the map view, click **Map** in the menu bar.



To adjust the size of the viewing panel, click and drag the bar that divides the map view and the **Seismic** grid.

To view the **Map** panel in a separate window, or move to an alternate monitor, click and hold in the header of the panel and drag to float.

Using the map toolbar

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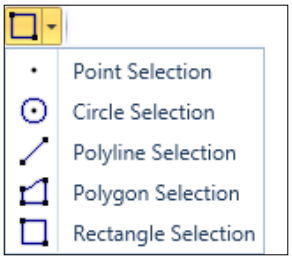
To activate a tool, click the item in the toolbar.



Add: Use the **Select** tool to select seismic on the map. Click **Add** and the seismic adds to the **Seismic** grid.



Deselct: Deselect all features that are currently selected on the map.



Select: Click to open the selection options. Using the selection tool, click on, or draw around, items on the map to select.



Pan: Click and drag to pan the map. Double-click to zoom in slightly.



Zoom in: Draw an area on the map to zoom the view to the specified extent.



Zoom out: Draw an area to quickly zoom out.



Previous extent: Click to go back to the previous extent.



Next extent: After clicking to load to a previous extent, click **Next extent** to go forward again.



Full map: Click to expand the view to the full extent of the map.



Search: Click to open a Search window. For more information see "Search the map " on the next page.



Identify: Identify the features of particular items on the map.

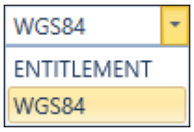
Click to activate the **Identify** cursor  . For more information see "Identifying features " on page 51.



Bookmarks: Create or select a bookmark for quick navigation to map locations.



Layers: Click to open the layers legend. In the layers legend, select and deselect to display different map layers. The map layers you select save to your profile for the next time you open the **Map**.



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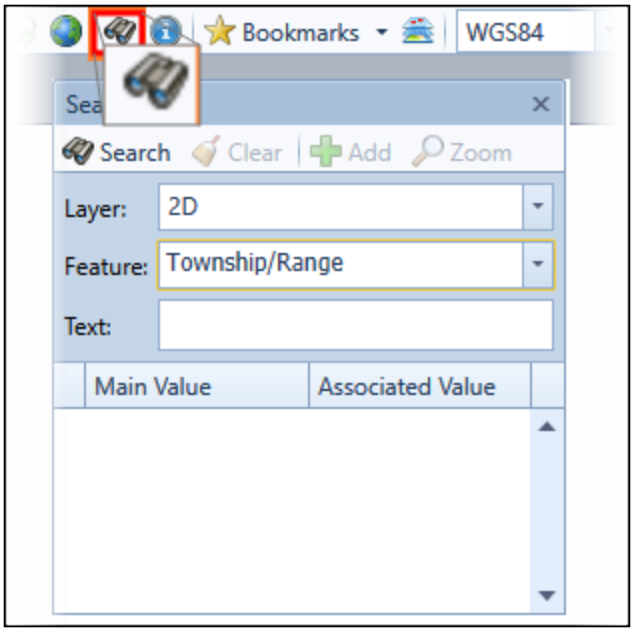
Log: Click to open a log of your actions. This log is useful for troubleshooting map issues.

Search the map

The search function is a quick method for locating records on the map.

To search for records:

1. Click **Search** to open the **Search** window.



2. In the **Search** window, select a layer and feature.
3. Enter text to filter your search.

> **Note:**
> The search fields do not support Wildcard characters (* or %).

4. Click **Search** and the results populate in the grid.
5. To navigate to the map location of the seismic, select the seismic and click **Zoom To**.

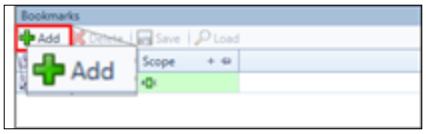
Create map bookmarks

Bookmarks provide quick navigation to specified map locations.

To create a new bookmark:

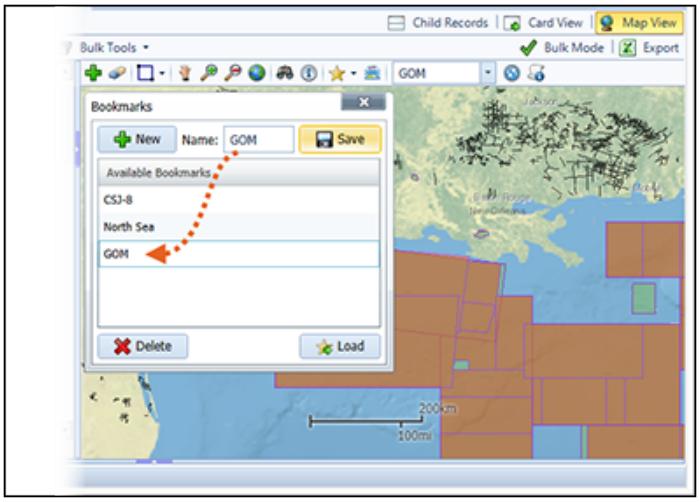
1. Navigate to the target location on the map.
2. Click Bookmarks to open the **Bookmarks** window.

3. Click **Add**.



4. Enter a name for your bookmark then click **Save**.

   The bookmark will add to the list of bookmarks and will be available from the bookmark drop-down.



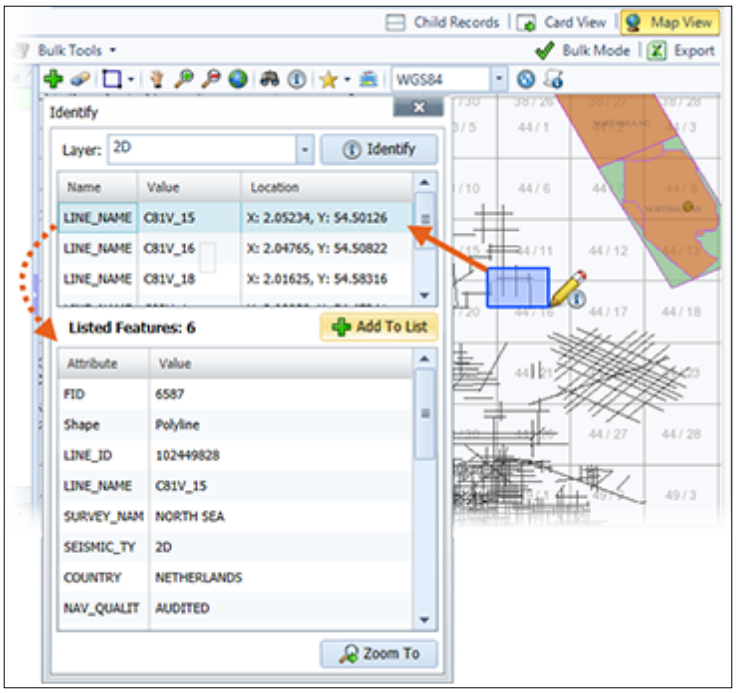
5. To navigate to a bookmarked location, select the bookmark from the **Bookmarks** drop-down menu.

Identifying features

The **Identify** function provides a quick view of seismic features and quick navigation to the map location.

Identify: Populates a list of features associated to an item.

To Identify features:

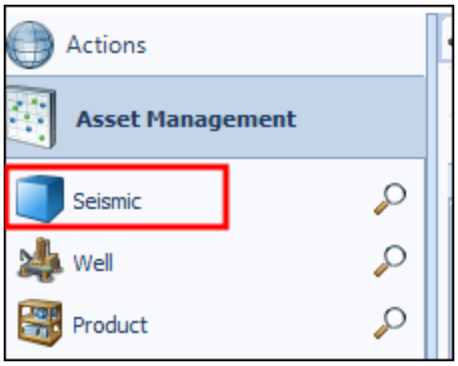


1. Locate the seismic data on the map and zoom to the area.
2. Click **Identify** to turn on the identify selection cursor .
3. Click and drag to draw an area around items on the map.
   The results open in the **Identify** window.
4. Click on an item in the upper grid to display the associated features in the lower grid.
5. Click **Zoom To** to zoom the map view to the item location.
6. To add items from the **Identify** window directly to the **Seismic** grid, select the item and click **Add To List**. To select multiple items, hold Ctrl or Shift and click.

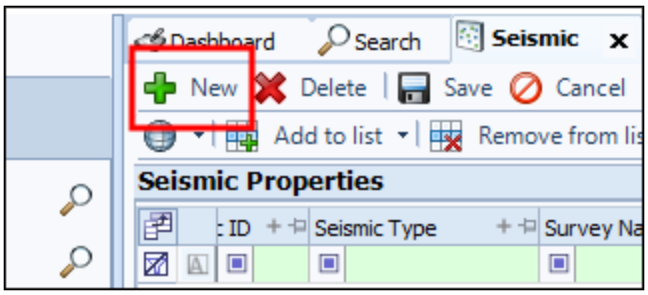
Add a seismic survey

To manually add new seismic to Exploration Archives:

1. Click **Seismic** in the Navigation panel to open the module.

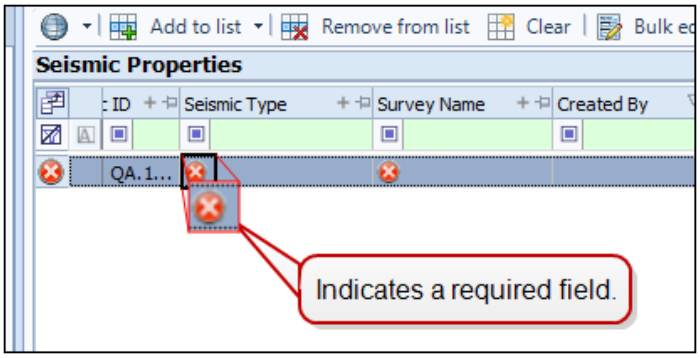


2. Click **New** and a new row displays in the grid.



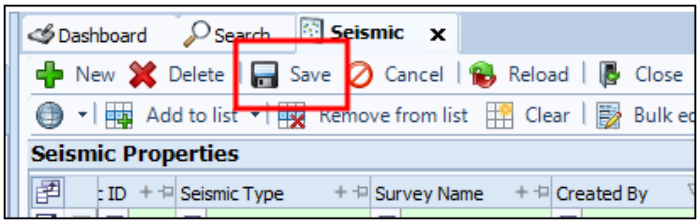
Note:
The system will auto-generate a **Seismic ID**.

3. Enter the relevant details in the fields for each column. A red x indicates required field.

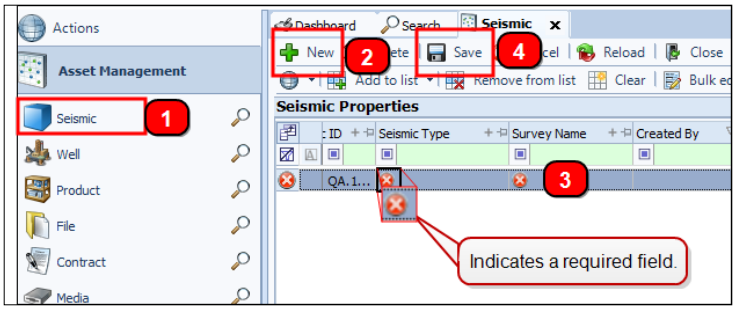


Note:
Hover over the to display correction instructions. Correct all errors before saving.

4. Click **Save**.



To manually add new seismic to Exploration Archives:



1. Click **Seismic** in the Navigation panel to open the module.
2. Click **New** and a new row displays in the grid.

> **Note:**
> The system will auto-generate a **Seismic ID**.

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> Hover over the to display correction instructions. Correct all errors before saving.

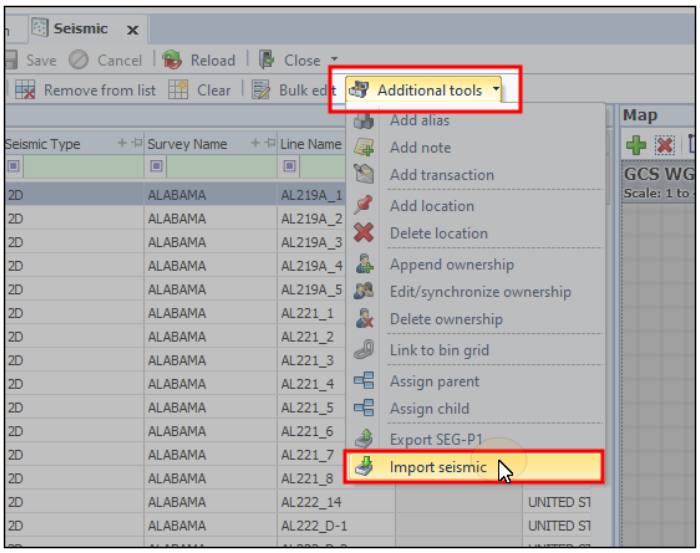
4. Click **Save**.

Add seismic from Excel®

Importing seismic using Excel requires specific formatting for the detail to import correctly to Exploration Archives. You can create the template directly from the **Seismic** module. For details on creating a template, see "Create an import template" on page 57.

To import seismic details from Excel:

1. In the **Seismic** module, click **Additional Tools**>**Import Seismic**.



2. Navigate to the location of your spreadsheet.
3. Select the file and click **Open**.
4. During import, the system validates IDs. The validation outcomes include:

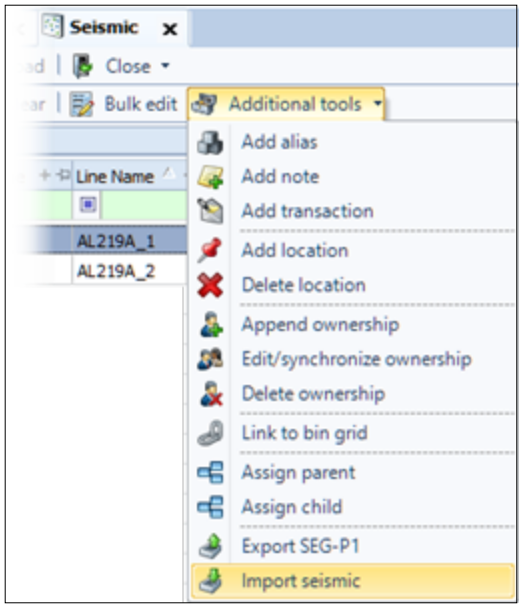
- **Seismic ID column omitted**: system auto-generates line IDs.
- **Existing Seismic IDs**: detail in the spreadsheet overwrites existing detail in Exploration Archives.
- **Invalid Seismic IDs**: data will not import.

5. When the import is complete, review the items to ensure the data is accurate.
6. Correct any errors in the grid.
7. Click **Save**.

Importing seismic using Excel requires specific formatting for the detail to import correctly to Exploration Archives. You can create the template directly from the **Seismic** module. For details on creating a template, see "Create an import template" on page 57.

To import seismic details from Excel:

1. In the **Seismic** module, click **Additional Tools**>**Import Seismic**.



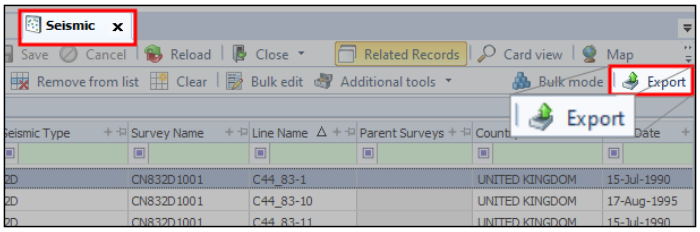
2. Navigate to the location of your spreadsheet.
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   - **Seismic ID column omitted**: system auto-generates line IDs.
   - **Existing Seismic IDs**: detail in the spreadsheet overwrites existing detail in Exploration Archives.
   - **Invalid Seismic IDs**: data will not import.

5. When the import is complete, review the items to ensure the data is accurate.
6. Correct any errors in the grid.
7. Click **Save**.

Create an import template

To create an Excel template:

1. In the **Seismic** module, click **Export** .



> **Warning:**
> The contents of the grid will be saved in the file. If you want a blank template, you can clear the table contents before you click **Export**.

2. The **Save As** window opens.
3. Navigate to the location you want to save the template and enter a file name.
4. Click **Save**.
5. After a few seconds The template will open in Excel.
6. Review the column headers and delete the columns that are not relevant to your data.

> **Note:**
> If you are adding new seismic, you should delete the Seismic ID column. Exploration Archives will generate a Seismic ID automatically.

7. To include alias names, insert a new column with the name "Aliases". Enter an alias for each item.

> **Tip:** To add multiple aliases to one line, use a comma to separate the names.

8. Enter values in the associated columns for each new seismic item.
9. Save the file and close the spreadsheet.

To create an Excel template:

1. In the **Seismic** module, click **Export** .

> **Note:**
> The contents of the table will be saved in the file. If you want a blank template, you can clear the table contents before you click **Export**.

2. The **Save As** window opens.
3. Navigate to the location you want to save the template and enter a file name.
4. Click **Save**.
5. After a few seconds The template will open in Excel.

6. Review the column headers and delete the columns that are not relevant to your data.

   Note:
   If you are adding new seismic, you should delete the Seismic ID column. Exploration Archives will generate a Seismic ID automatically.

7. To include alias names, insert a new column with the name "Aliases". Enter an alias for each item.

   Tip: To add multiple aliases to one line, use a comma to separate the names.

8. Enter values in the associated columns for each new seismic item.
9. Save the file and close the spreadsheet.

Correct errors

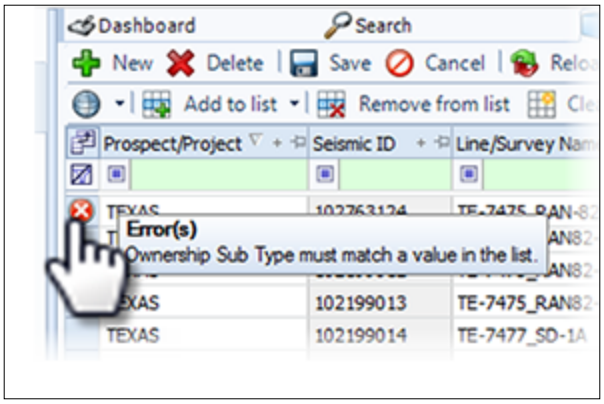
When importing seismic using Excel, Exploration Archivesperforms validation checks on the data. When complete, a  displays next to any invalid data.

You must correct the errors before saving the data.

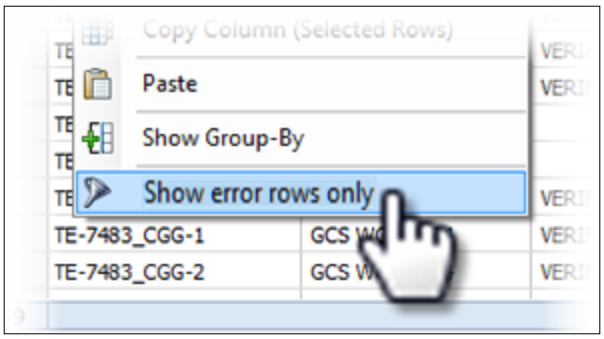
Locating and correcting errors

The “X” that displays in the leader column notifies you that the row has an error.

Hover over the “X” to display a tool tip that describes the error.



To filter the grid to display only rows that have errors, right-click on the grid and select **Show error rows only**.



Enter (or select) the correct information for each field. Click **Save**.

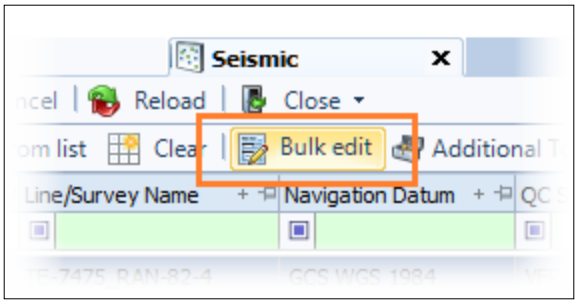
Correcting multiple duplicate errors

Rows might have errors duplicated. For example, a some rows may be missing information in a column thats required, or the syntax of data may be wrong.

This is where you can use **Bulk Edit** to replace the same information in multiple rows.

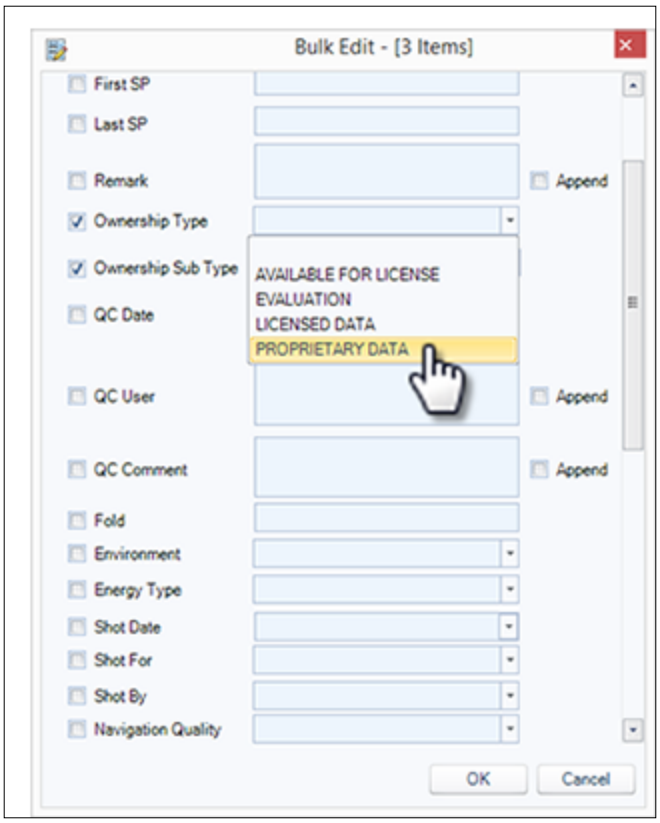
There are two methods to select rows that need to have errors corrected::

1. Right-click on the grid and select **Show error rows only**. Right-click and select **Select all**. To remove this filter, right-click and select **Show all rows**.
2. Use Bulk Mode to select rows:
   - Click in the leader column and drag to select consecutive rows in the grid.
   - Hold **Ctrl** and click on rows that aren't consecutive.
3. After selecting the rows, click **Bulk edit** on the toolbar.



The **Bulk edit** window will open.
The windows displays the fields that you can enter information into and apply to the selected rows.

4. Fill in the appropriate fields by typing or selecting values from drop-down lists



5. Click **OK**. The Bulk Edit window will close, and your changes will appear in the grid.
6. Once you have verified the data, click **Save**.

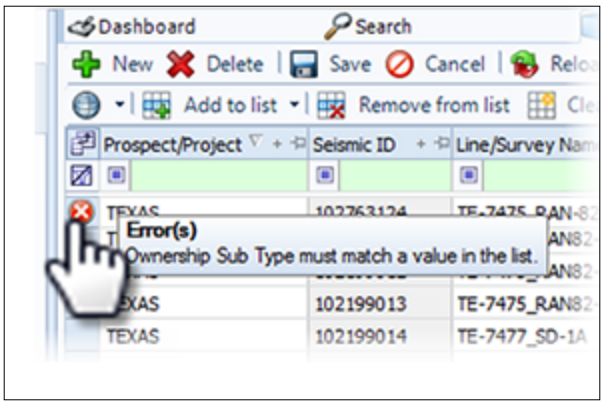
When importing seismic using Excel, Exploration Archivesperforms validation checks on the data. When complete, a displays next to any invalid data.

You must correct the errors before saving the data.

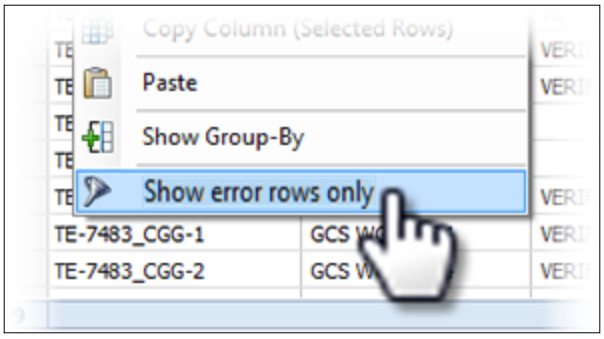
Locating and correcting errors

The “X” that displays in the leader column notifies you that the row has an error.

Hover over the “X” to display a tooltip that describes the error.



To filter the grid to display only rows that have errors, right-click on the grid and select **Show error rows only**.



Enter (or select) the correct information for each field. Click **Save**.

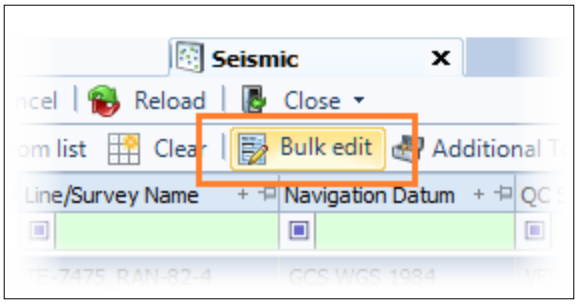
Correcting multiple duplicate errors

Rows might have errors duplicated. For example, a some rows may be missing information in a column thats required, or the syntax of data may be wrong.

This is where you can use **Bulk Edit** to replace the same information in multiple rows.

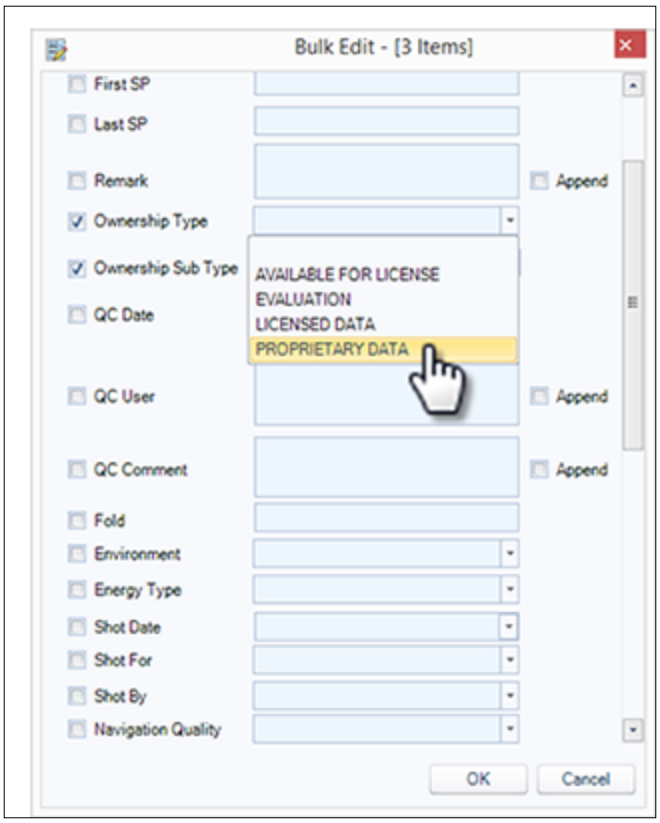
There are two methods to select rows that need to have errors corrected::

1. Right-click on the grid and select **Show error rows only**. Right-click and select **Select all**. To remove this filter, right-click and select **Show all rows**.
2. Use Bulk Mode to select rows:
   - Click in the leader column and drag to select consecutive rows in the grid.
   - Press Ctrl and click on rows that aren't consecutive.
3. After selecting the rows, click **Bulk edit** on the toolbar.



The **Bulk edit** window will open.
The windows displays the fields that you can enter information into and apply to the selected rows.

4. Fill in the appropriate fields by typing or selecting values from drop-down lists

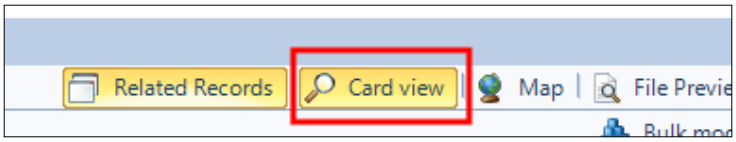


5. Click **OK**. The Bulk Edit window will close, and your changes will appear in the grid.
6. Once you have verified the data, click **Save**.

Use Card View

Where the grid view displays multiple data records, **Card View** offers a compact view of data from a single row.

To open the single item view, select a target row in the **Seismic** grid and click **Card view**.

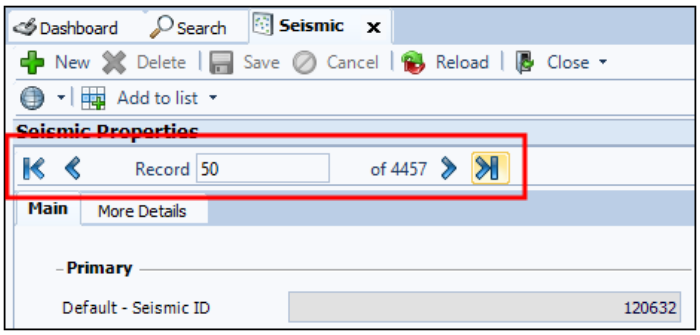


To open **Card View**:

1. Click **Card view** to toggle the view on.

   The highlighted record opens with the details displayed in the workspace. The Information is broken into two tabs; **Main** and **More Details**.

2. You can navigate between records by navigation arrows on the toolbar.



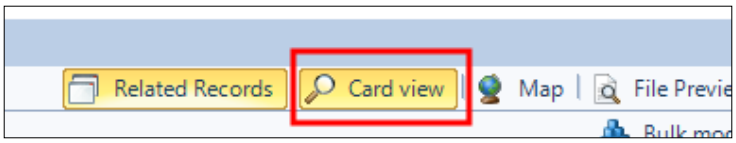
3. To edit details in a record, fill in the appropriate fields on the card.

   Note: Depending on the purpose of the field and your security permissions, some fields may not be available for editing.

4. Once you have edited the information in the card, click **Save**.
5. To return to grid view, click **Card view** a second time to toggle it off.

Where the grid view displays multiple data records, **Card View** offers a compact view of data from a single row.

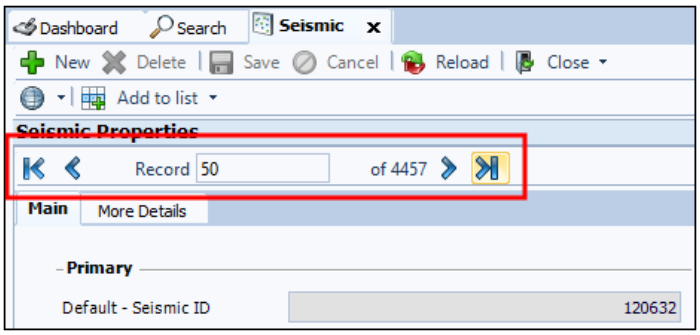
To open the single item view, select a target row in the **Seismic** grid and click **Card view**.



To open **Card View**:

1. Select a row in the grid.
2. Click **Card view** to toggle the view on.

   The highlighted record opens with the details displayed in the workspace. The Information is broken into two tabs; **Main** and **More Details**.
3. You can navigate between records by navigation arrows on the toolbar.



4. To edit details in a record, fill in the appropriate fields on the card.

   Note: Depending on the purpose of the field and your security permissions, some fields may not be available for editing.
5. Once you have edited the information in the card, click **Save**.
6. To return to grid view, click **Card view** a second time to toggle it off.

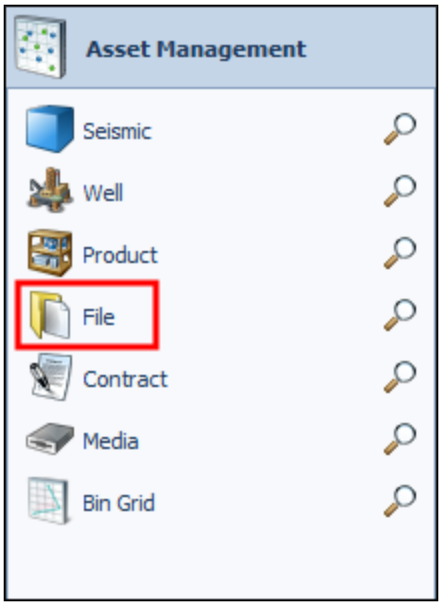
Add and link a file

Adding seismic to Exploration Archives typically involves cataloging and linking files through the Catalog module.

However, you can add a file outside of the cataloging procedure and link the file to seismic. This may be a more suitable approach if you are adding seismic and already have an affiliated contract.

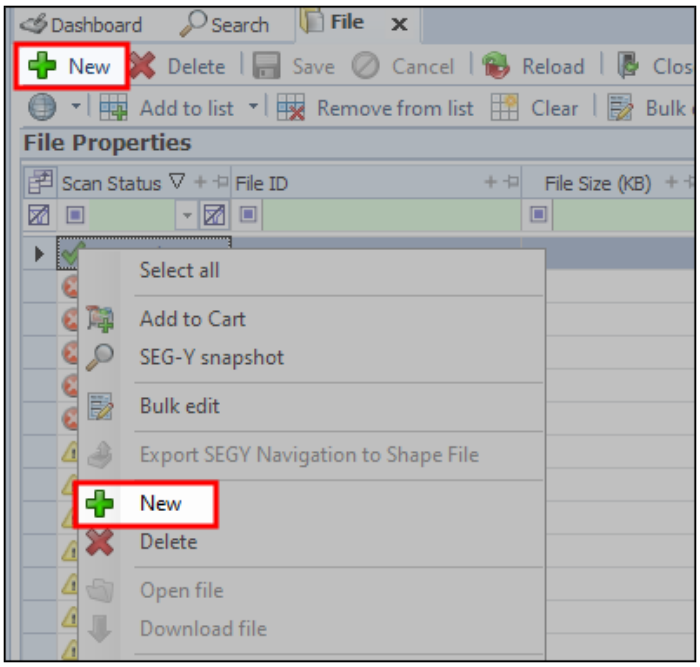
Use the **File** module to add and link a file (such as a contract) to seismic:

1. Under **Asset Management** in the navigation panel, click **File**.



The **File** module opens.

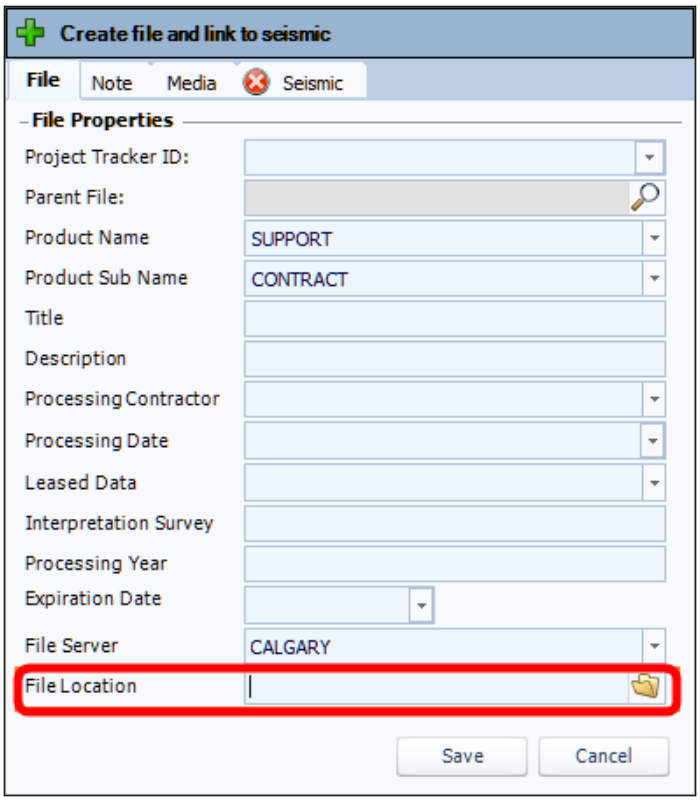
2. In the **File Properties** panel, select **NEW** in the tool bar, or right-click to open the context menu then select **New** .



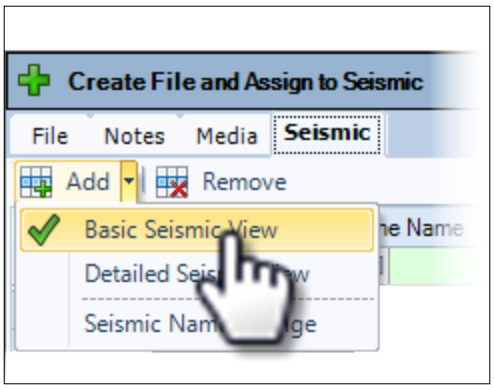
The **Create file and link to seismic** window opens.

The window is divided into 4 tabs:

3. In the **File** tab, enter the file properties.
4. For **File Location** click **browse** and navigate to the file to add.

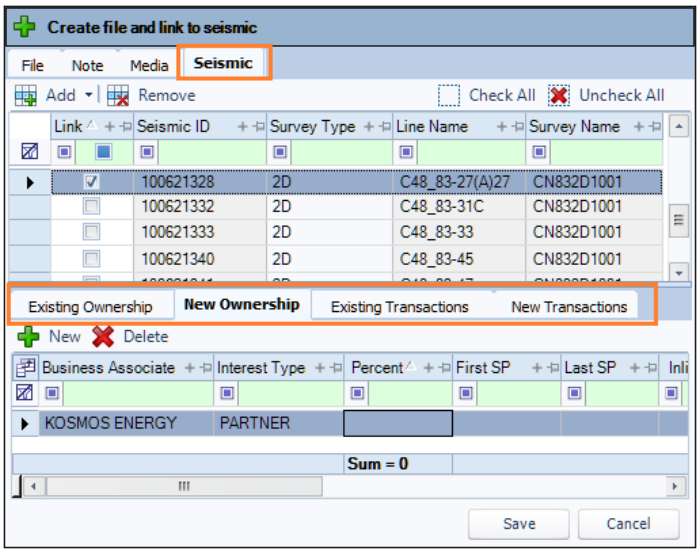


5. In the **Notes** tab, enter a note if applicable.
6. In the **Media** tab, the default is set to **Do not Create/Link Media**. To create or link media, select the appropriate options.
7. Click the **Seismic** tab.
8. To locate the seismic to link the file to, click the down arrow next to **Add** and select a search option.



The search window opens.

9. Enter the search criteria then click **Search**. The search results appear in the grid.
10. In the Link Column, Select the checkbox of the seismic record.
11. In the lower grid, enter the ownership and transaction detail in the applicable tabs.



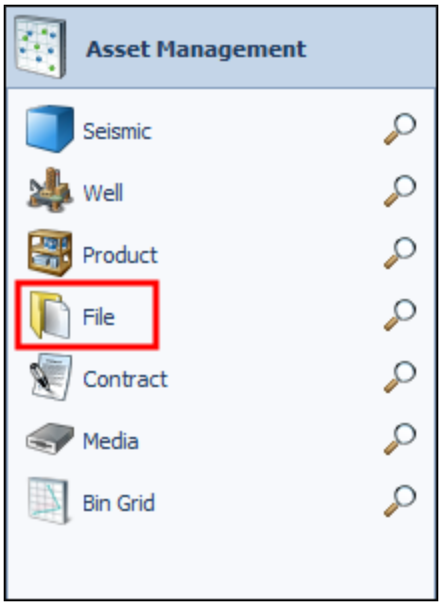
12. Click **Save**.

Adding seismic to Exploration Archives typically involves cataloging and linking files through the Catalog module.

However, you can add a file outside of the cataloging procedure and link the file to seismic. This may be a more suitable approach if you are adding seismic and already have an affiliated contract.

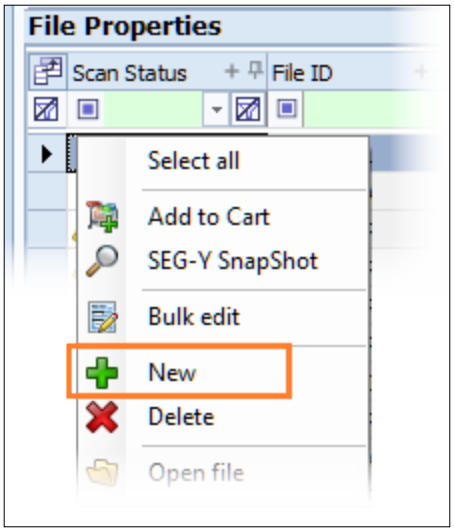
Use the **File** module to add and link a file (such as a contract) to seismic:

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The **File** module opens.

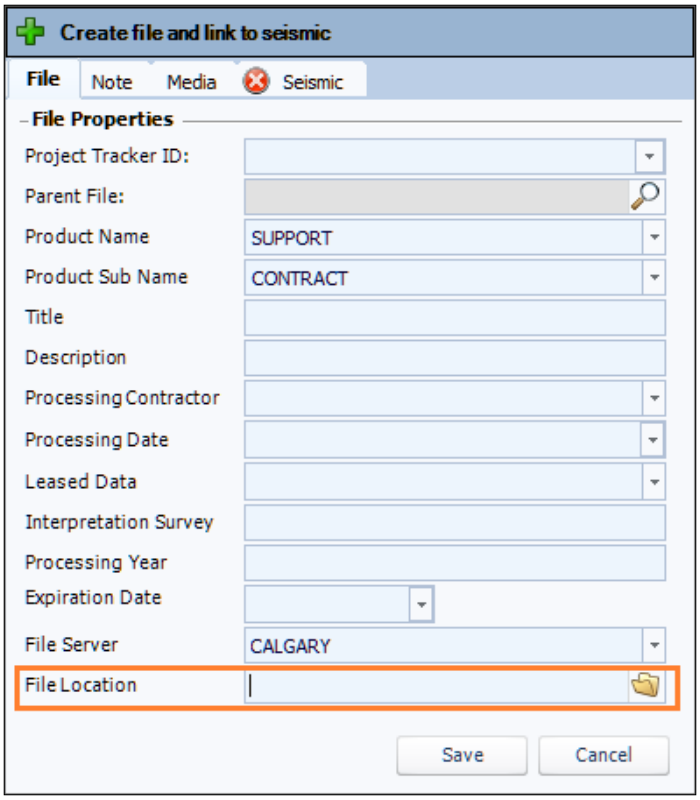
2. In the **File Properties** panel, right-click to open the context menu then select **New** .



The **Create file and link to seismic** window opens.

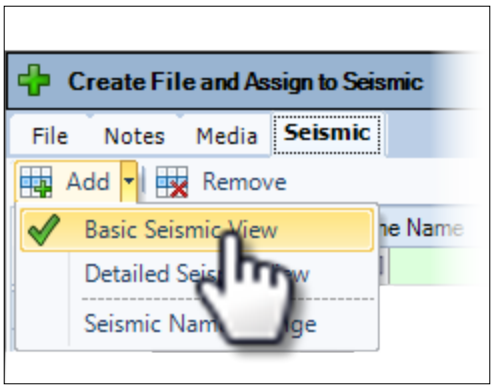
The window is divided into 4 tabs:

3. In the **File** tab, select the file properties.



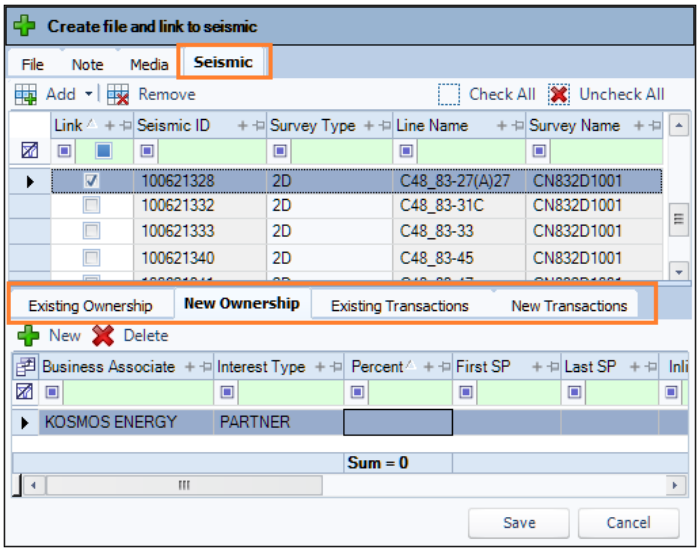
4. For **File Location** click **browse** and navigate to the file to add.
5. In the **Notes** tab, enter a note if applicable.

6. In the **Media** tab, the default is set to **Do not Create/Link Media**. To create or link media, select the appropriate options.
7. Click the **Seismic** tab.
8. To locate the seismic to link the file to, click the down arrow next to **Add** and select a search option.



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9. Enter the search criteria then click **Search**. The search results appear in the grid.
10. In the Link Column, Select the checkbox of the seismic record.
11. In the lower grid, enter the ownership and transaction detail in the applicable tabs.



12. Click **Save**.

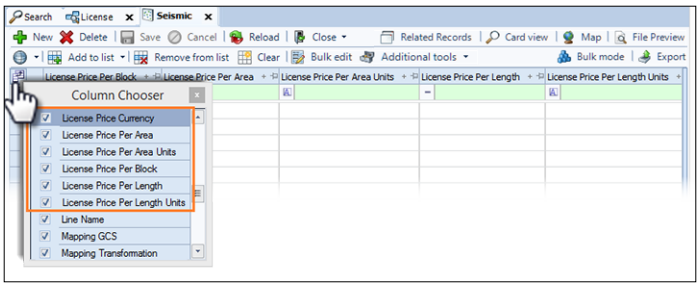
Set license price

> **Note:**
> The License module includes a calculation tool that populates license fees for seismic that is for sale. The fees calculate according the prices set for the survey in the Seismic module.

To set the license price:

1. Select the record in the Seismic module.
2. Locate the license price columns in the main grid.

> **Note:**
> If the license price columns are not in the grid, use the **Column Chooser** to add them.
> Click the column chooser icon (upper left corner of the grid) to open the list of available columns. Drag and drop the license columns from the **Column Chooser** to the grid.



3. Enter the license price details for each column, as applicable:

> **Note:** When entering values that require a decimal amount you need to type the decimal.

Licence Price Currency	This is a drop-down list where you can select the currency the License Price is in.
License Price Per Area	Double-click in this cell to enter an amount that reflects the cost of the license per area.
License Price Per Area Units	This field is a drop-down list that allows you to select the units of measurement for the License per Area.
License Price Per Block	Double-click in this cell to enter an amount for the License price per block of land.
License Price Per Length	Double-click in this cell to enter an amount for the License price per length of land.
License Price Per Length Units	This is a drop-down list that lets your select the units of measurement

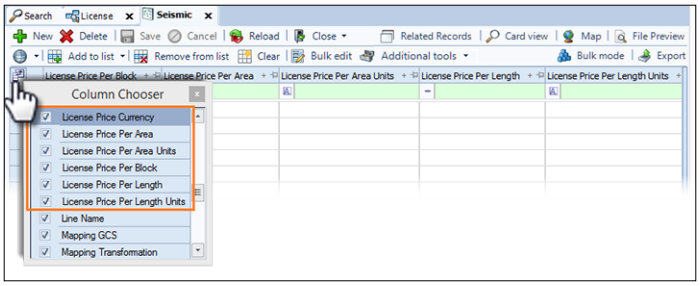
4. Click **Save**.

The License module includes a calculation tool that populates license fees for seismic that is for sale. The fees calculate according the prices set for the survey in the Seismic module.

To set the license price:

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Licence Price Currency	This is a drop-down list where you can select the currency the License Price is in.
License Price Per Area	Double-click in this cell to enter an amount that reflects the cost of the license per area.
License Price Per Area Units	This field is a drop-down list that allows you to select the units of measurement for the License per Area.
License Price Per Block	Double-click in this cell to enter an amount for the License price per block of land.
License Price Per Length	Double-click in this cell to enter an amount for the License price per length of land.
License Price Per Length Units	This is a drop-down list that lets your select the units of measurement

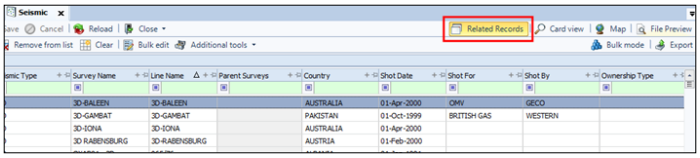
4. Click **Save**.

Manage Related Records

The **Related Records** panel displays additional metadata associated to highlighted seismic data.

To display Related Records:

1. Click **Related Records** in the upper right corner of the **Seismic** module.

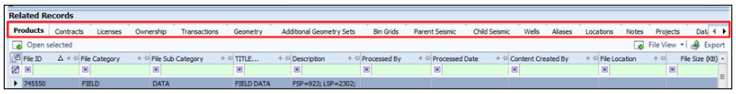


2. The **Related Records** panel will open in the lower portion of the workspace.

   The panel displays the data associated with the seismic record(s) selected in the Seismic Properties.

> **Tip:** Use **Bulk mode** to select multiple records and display the combined **Related Records**.

The **Related Records** panel is divided into tabs that includes several sections. Use the horizontal scroll bar to see all tabs.



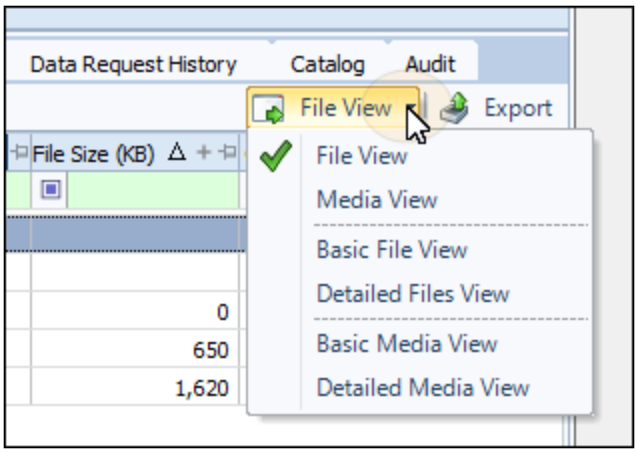
Use the column chooser to customize the columns to display.

View product detail

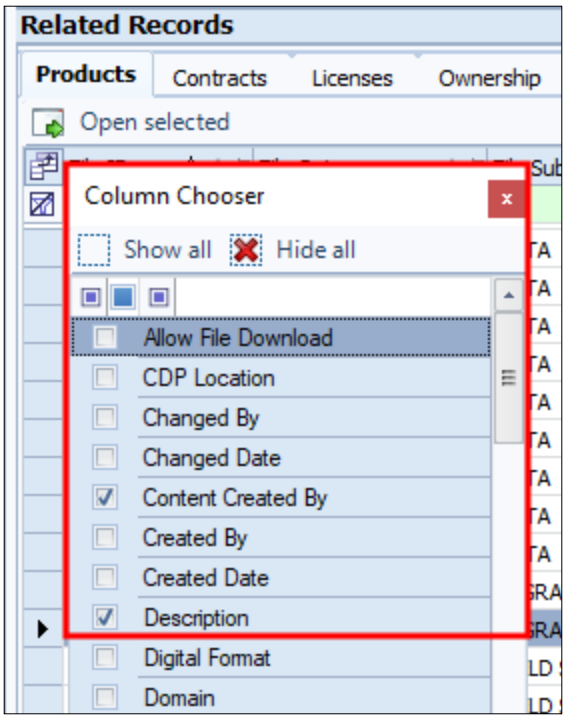
The **Products** tab in the **Related Records** panel lists the associated products for the highlighted record. In this tab, you can view or copy the product details, or add them to a data request.

The products that can be displayed in the tab can be either **Files** or **Media**.

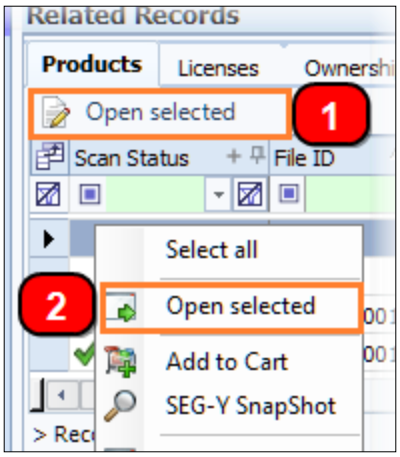
You can change the view from the File View



The columns that initially appear on the grid can be changed at any time by using the column chooser.



Products displayed in the grid can be opened in their respective modules by either:



1. Highlighting the row then from the toolbar click **Open selected**
2. Right-click then from the context menu click **Open selected**.

The product will open in the related module. You can edit it as per normal.

Available actions

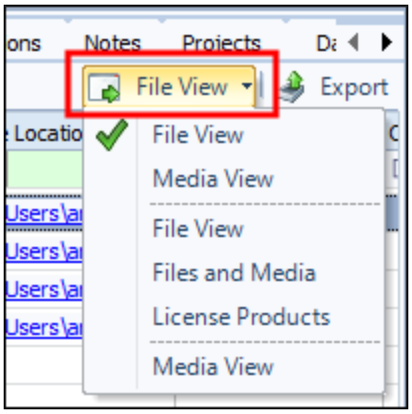
To access the actions available for a product in the **Product** tab, select a row (or multiple rows) in the grid. Right-click to open the context menu and select an available action.

Open selected: Click to open the selected record in the relevant module to edit. If the selected item is a file, the record opens in the File module. If the selected item is media, the record opens in the Media module.
Add to Cart: Click to add the items to the **Cart**.
SEG-Y snapshot: Click to open a collection of condensed SEG-Y files
Open file: Click to open selected file. To open files, you must have access to the storage location.
Download file: Click to download file. To download, you must have access to the storage location.
Export: Click to export the grid to Excel®.
Export selected: Click to export the selected row(s) to Excel®.
Copy cell : Click to copy the contents of the cell to paste into a search field or other area.
Copy row: Click to copy the text that is in the row to paste into another grid or other area.
Copy column: Click to copy the rows in the particular column.
Show group-by: Click to open the Group-By option for grouping data by columns.

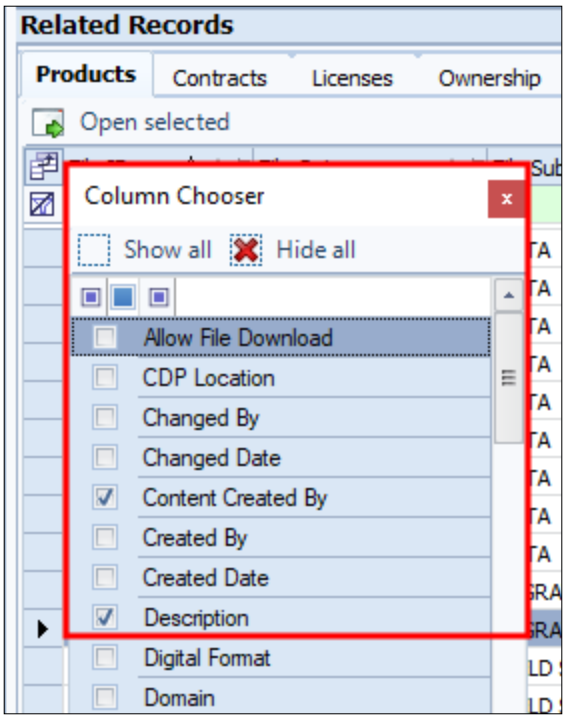
The **Products** tab in the **Related Records** panel lists the associated products for the highlighted record. In this tab, you can view or copy the product details, or add them to a data request.

The products that can be displayed in the tab can be either **Files**, **Media**, or **License Products**.

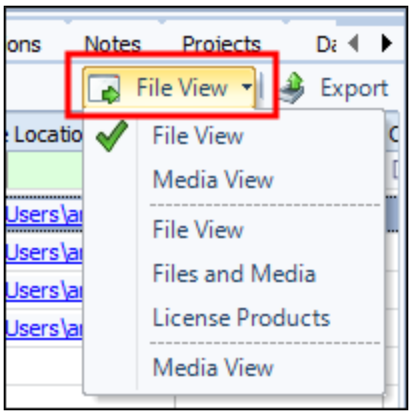
You can change the view from the File View



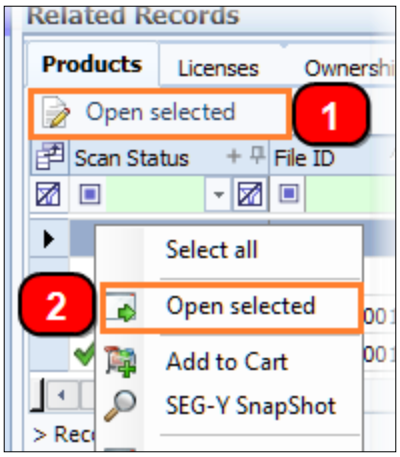
The columns that initially appear on the grid can be changed at any time by using the column chooser.



You can also change the file views by using the File View menu in the upper right corner of the panel.



Products displayed in the grid can be opened in their respective modules by either:



1. Highlighting the row then from the toolbar click **Open selected**
2. Right-click then from the context menu click **Open selected**.

The product will open in the related module. You can edit it as per normal.

Available actions

To access the actions available for a product in the **Product** tab, select a row (or multiple rows) in the grid. Right-click to open the context menu and select an available action.

Open selected: Click to open the selected record in the relevant module to edit. If the selected item is a file, the record opens in the File module. If the selected item is media, the record opens in the Media module.
Add to Cart: Click to add the items to the **Cart**.
SEG-Y SnapShot: Click to open a collection of condensed SEG-Y files
Open file: Click to open selected file. To open files, you must have access to the storage location.
Download file: Click to download file. To download, you must have access to the storage location.
Export: Click to export the grid to Excel®.
Export Selected: Click to export the selected row(s) to Excel®.
Copy cell : Click to copy the contents of the cell to paste into a search field or other area.
Copy rows: Click to copy the text that is in the row to paste into another grid or other area.
Copy column: Click to copy the rows in the particular column.
Show group-by: Click to open the Group-By option for grouping data by columns.

Entering ownership detail

The grid in the **Ownership** tab displays the owners of the seismic, the type of ownership, per cent of their ownership share, and other information related to ownership.

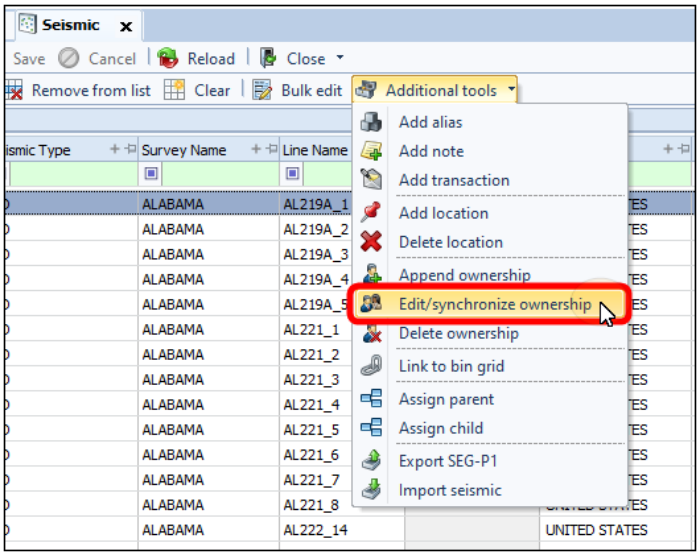
Use the **Ownership** tab to edit the existing ownership details or add a new Business Associate owner. Click **Save** when complete.

Editing ownership for multiple seismic records

To add, edit or synchronize ownership for multiple records, use the **Additional tools** option. The **Additional tools** populates all assigned ownerships in the edit window for you to review, adjust and synchronize as required.

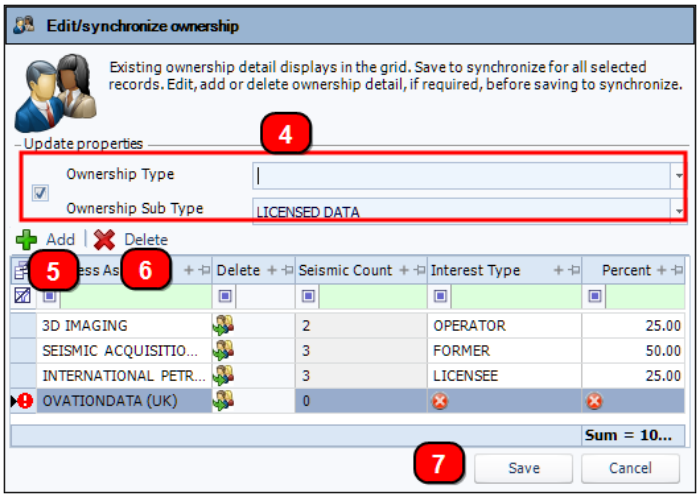
To edit ownership for multiple items:

1. In the main grid, select the record(s) to edit.
2. Click **Additional tools>Edit/synchronize ownership** in the local toolbar



Tip: You can also right-click in the grid to open the context menu and click **Additional tools>Edit/synchronize ownership**.

3. In the **Edit/synchronize ownership** window, enter the relevant details.



4. To edit the **Ownership Type** and**Ownership Sub Type**, select the checkbox and select an entry for one or both fields. Refer to the acquisition ownership details to update.
5. To add a new ownership, click **Add** and enter the detail in the grid. Enter the required detail.
6. To delete an ownership, select the record on the grid and click **Delete** .
7. When your edits are complete, click **Save**. The changes affect all of the records you selected before opening the edit window.

The grid in the **Ownership** tab displays the owners of the seismic, the type of ownership, per cent of their ownership share, and other information related to ownership.

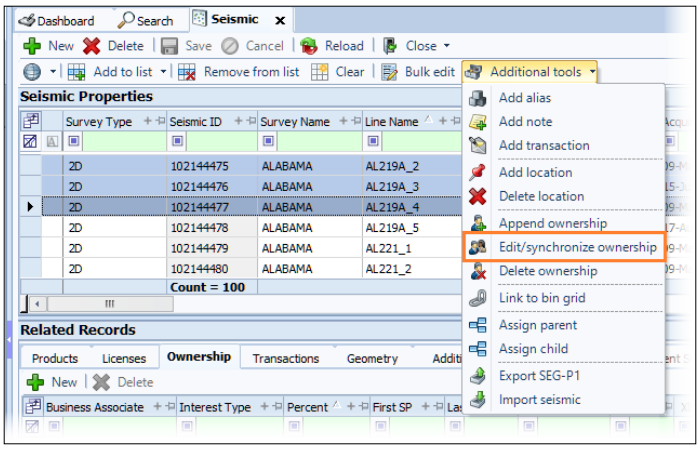
Use the **Ownership** tab to edit the existing ownership details or add a new Business Associate owner. Click **Save** when complete.

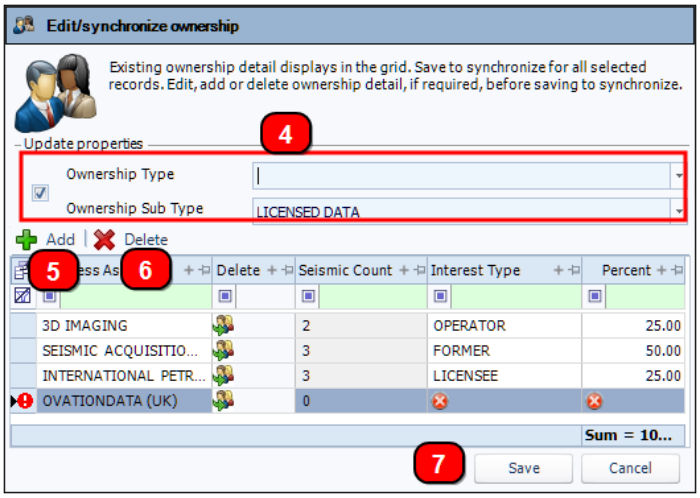
Editing ownership for multiple seismic records

To add, edit or synchronize ownership for multiple records, use the **Additional tools** option. The **Additional tools** populates all assigned ownerships in the edit window for you to review, adjust and synchronize as required.

To edit ownership for multiple items:

1. In the main grid, select the record(s) to edit.
2. Click **Additional tools > Edit/synchronize ownership** in the local toolbar





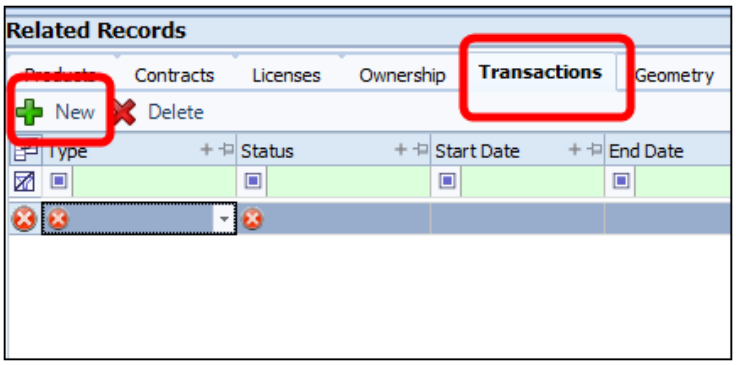
3. In the **Edit/synchronize ownership** window, enter the relevant details.

4. To edit the **Ownership Type** and**Ownership Sub Type**, select the checkbox and select an entry for one or both fields. Refer to the acquisition ownership details to update.
5. To add a new ownership, click **Add** and enter the detail in the grid. Enter the required detail.
6. To delete an ownership, select the record on the grid and click **Delete** .
7. When your edits are complete, click **Save**. The changes affect all of the records you selected before opening the edit window.

Entering transaction details

The **Transactions** tab provides a record of transactions associated to a line.

Click the **Transactions** tab and click **New** to add a row to the grid.

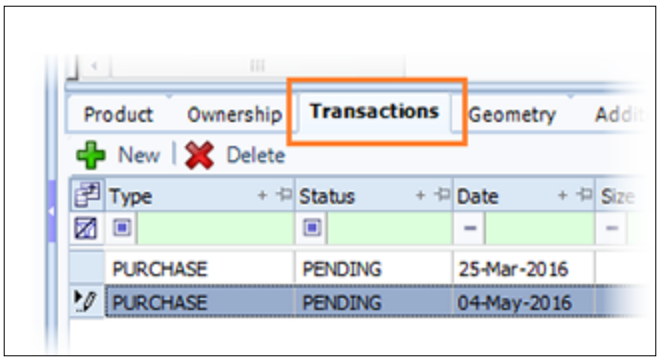


Enter the relevant information in each column from a series of drop-down lists, calendars, and text entry fields..

Click **Save**.

The **Transactions** tab provides a record of transactions associated to a line.

Click the **Transactions** tab and click **New** to add a row to the grid. Enter the relevant information and click **Save**.

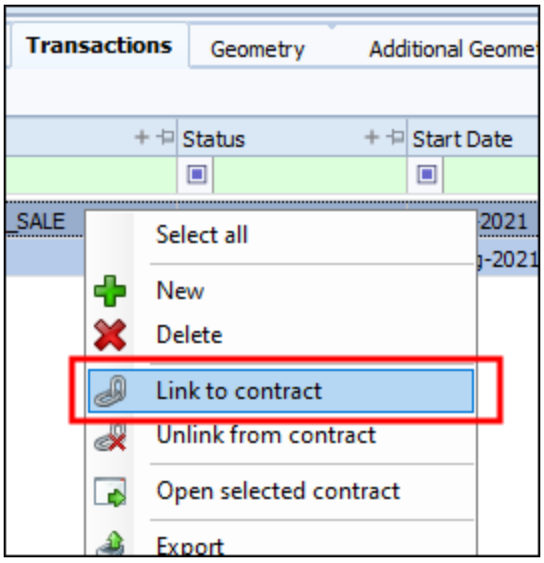


Link/Unlink Contract to Transaction

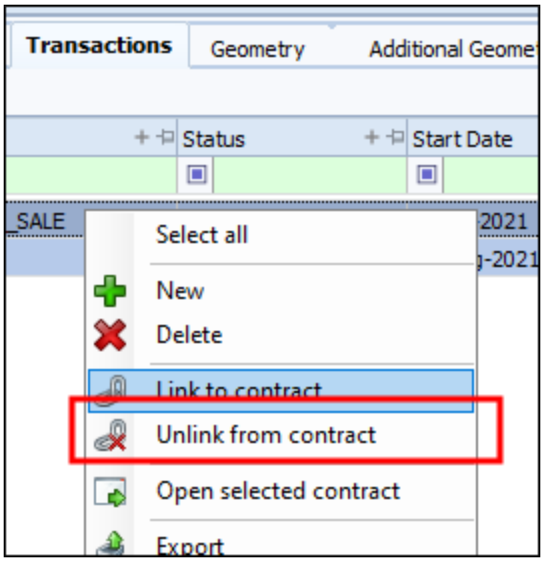
While in the Transactions tab, it is possible to link a seismic transaction to a contract.

To assign a Contract to one or more Seismic Transactions:

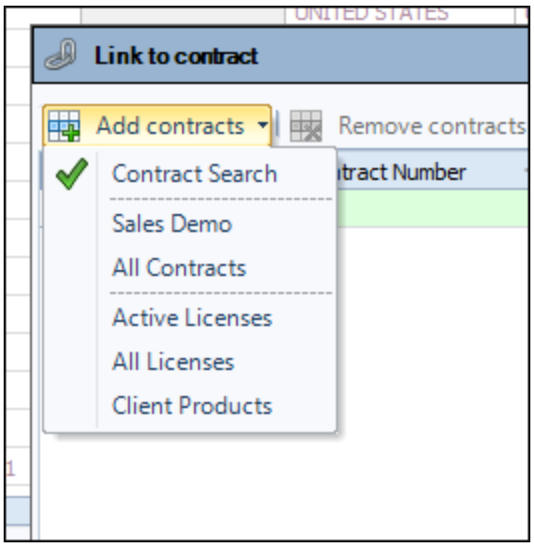
1. Use one of the following methods to select transaction(s) in the Transactions tab **Related Records** Panel:
   - Click to select a single row.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
   - To select multiple individual rows, press Ctrl while clicking to select.
2. Right-click on a selected row to open the context menu.
3. Select **Link to Contract**.



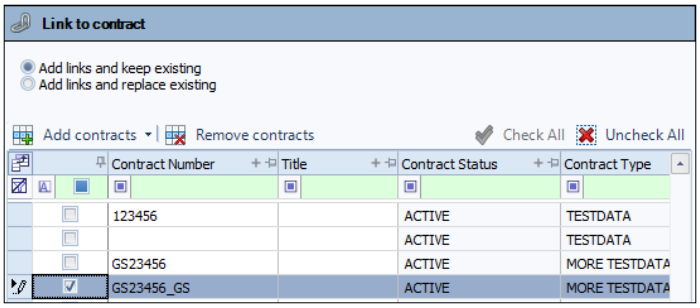
To unlink a contract, select **Unlink from Contract**



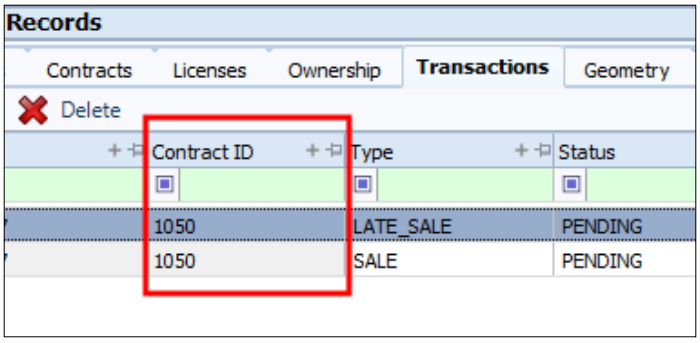
4. In the Link to contract window select **Contract Search** from the Add Contracts drop-down.



5. Enter your search criteria, then click **Search**. The results will populate the grid in the Link to contracts window.
6. From the results, select the check box next to the contract to be linked.



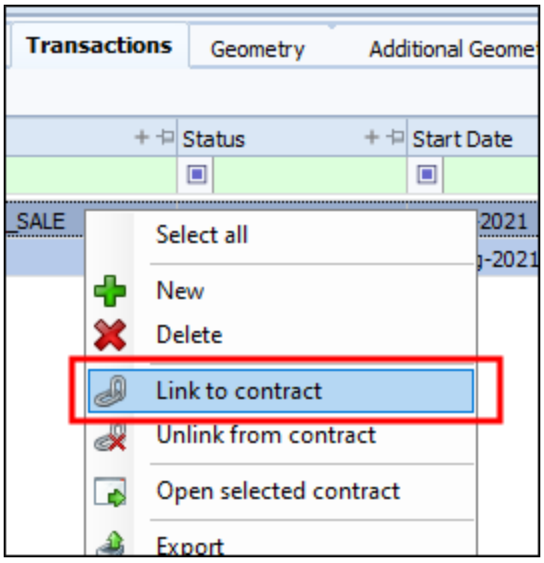
7. Select the option to either add links and keep existing or to add links and replace existing for the selected files.
8. Click **Save**. The contract number will appear in the Contract ID column in the Transaction grid.



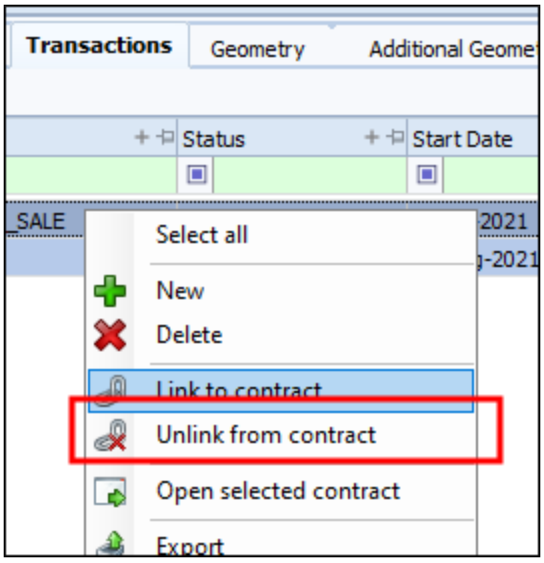
While in the Transactions tab, it is possible to link a seismic transaction to a contract.

To assign a Contract to one or more Seismic Transactions:

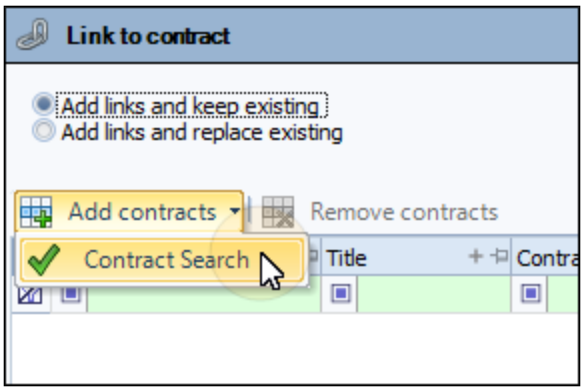
1. Use one of the following methods to select transaction(s) in the Transactions tab **Related Records** Panel:
   - Click to select a single row.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
   - To select multiple individual rows, press Ctrl while clicking to select.
2. Right-click on a selected row to open the context menu.
3. Select **Link to Contract**.



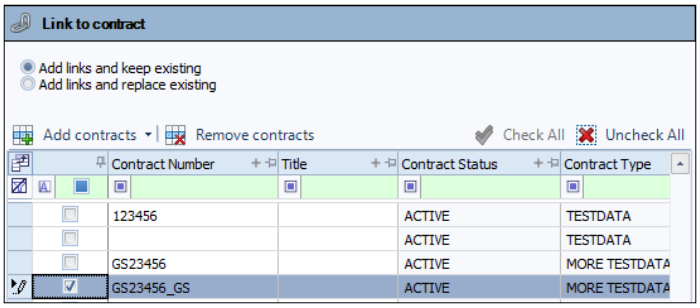
To unlink a contract, select **Unlink from Contract**



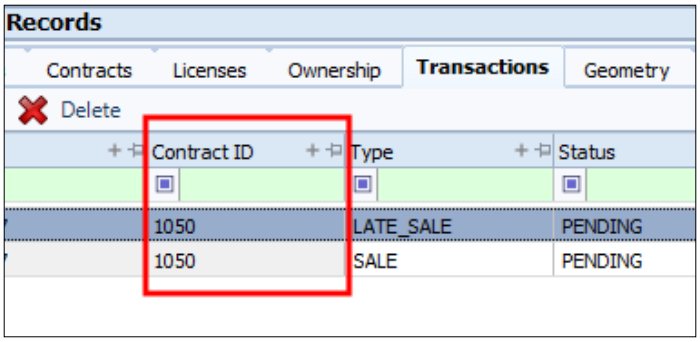
4. In the Link to contract window select **Contract Search** from the Add Contracts drop-down.



5. Enter your search criteria, then click **Search**. The results will populate the grid in the Link to contracts window.
6. From the results, select the check box next to the contract to be linked.



7. Select the option to either add links and keep existing or to add links and replace existing for the selected files.
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Adding geometry

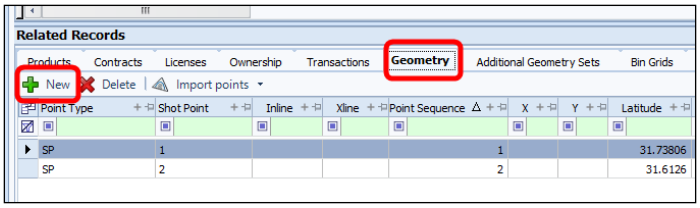
The **Geometry** tab of the **Related Records** in the **Seismic** module is for adding and viewing navigation.

For adding navigation, refer to the information for using Exploration ArchivesTools for ArcMap®in "Adding seismic navigation " on page 103.

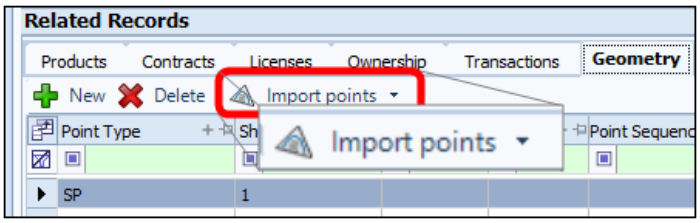
For existing navigation, the detail in the **Geometry** tab includes the points in the original data set, as well as the latitude and longitude values for the map view.

To add new geometry for a seismic item manually:

1. Select the record in the **Seismic Properties** grid.
2. Click **New** to display a new row in the grid and enter the relevant information for each column.



Alternatively, you can import values from an Excel® or CSV file by selecting **Import Points** on the tool bar.



3. Exploration Archives will automatically draw the shape on the map once the points are saved and the GCS is set.
4. Refer to "Importing points for geometry" on page 87 for details.
5. To add additional geometry sets refer to "Adding additional geometry sets" on the next page.

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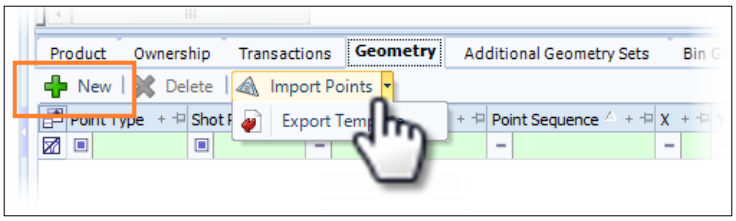
For adding navigation, refer to the information for using Exploration Archives Tools for ArcMap®in "Adding seismic navigation " on page 103.

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Exploration Archives will automatically draw the shape on the map once the points are saved and the GCS is set.

Refer to "Importing points for geometry" on the next page for details.

To add additional geometry sets refer to "Adding additional geometry sets" below.

Adding additional geometry sets

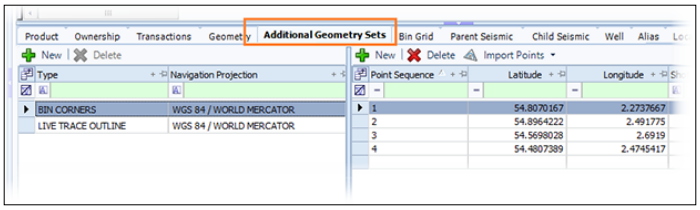
You can use the **Additional Geometry Sets** to store points from other Coordinate systems.

You may have your main Geometry set for one type of coordinate system, but have additional Geometry sets for a different coordinate system you want people to have access to.

> **Note:**
> The Map view shows the points stored in the geometry tab where the additional geometry sets do not.

To add additional geometry sets:

1. In the main grid, select the record to modify.
2. Click the **Additional Geometry Sets** tab.
   The grid on the left displays the coordinate details and the grid on the right displays the point details.



3. Click **New**.
4. Enter the applicable coordinate system information.

5. To avoid data entry errors refer to "Importing points for geometry" below to import points from a CSV or Excel file.
6. Click **Save**.

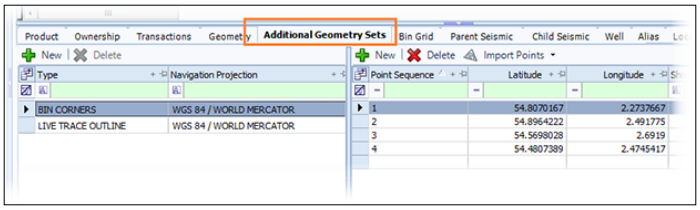
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6. Click **Save**.

Importing points for geometry

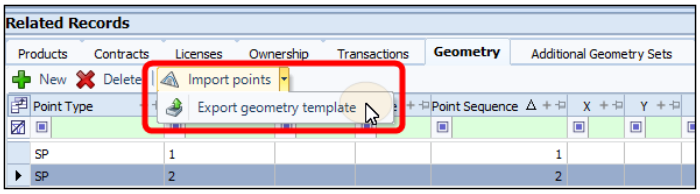
If you have a large amount of Geometry to enter for a record and you try and enter it manually it can be time consuming and there is chance for error.

To minimize that chance for error, you can create enter the data for Geometric Sets into an Excel® spreadsheet and then use **Import Points** to add the data.

To help you format the data correctly for the import, you can download a template to enter the data in.

To export a template:

1. From the toolbar, expand the **Import Points** menu then select **Export geometry template**.



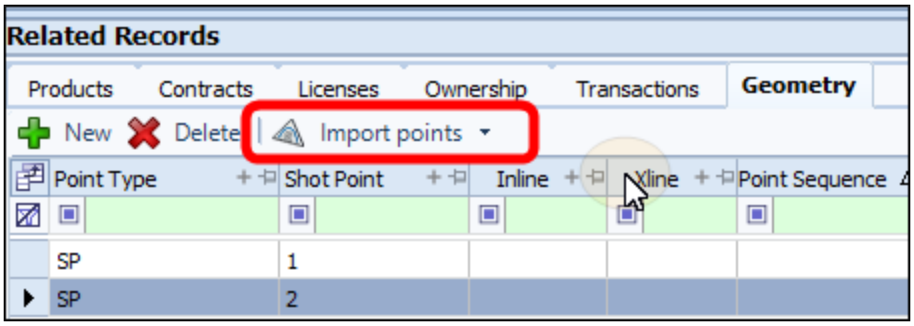
2. From the Save dialog navigate where you would like to save the template. If needed, enter a new name for the file.
3. Click **Save**.
4. After a few seconds the file will open in Excel.

> **Note:**
> When Exporting a Template, the Template file is generated with any data that is populating the grid. If there is any data in the file, you can delete it. Make sure to leave the column headings.

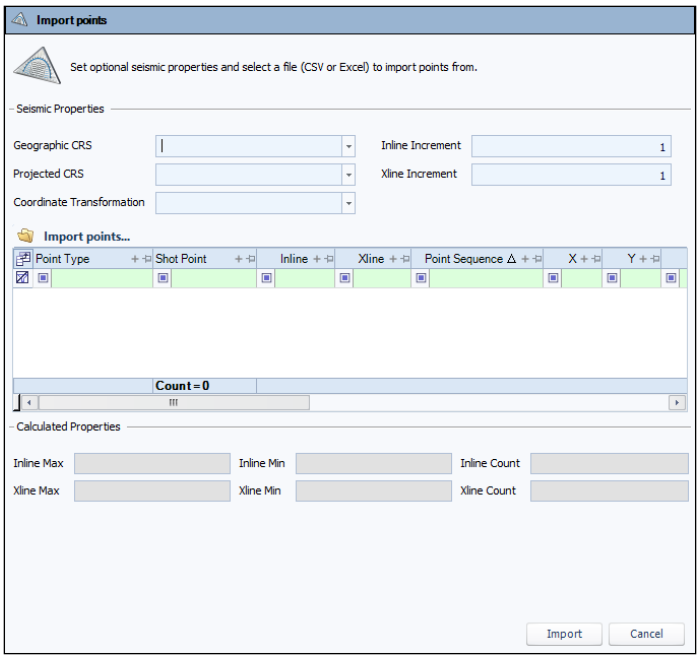
Enter your data into the worksheet then save it.

To import points for a seismic record:

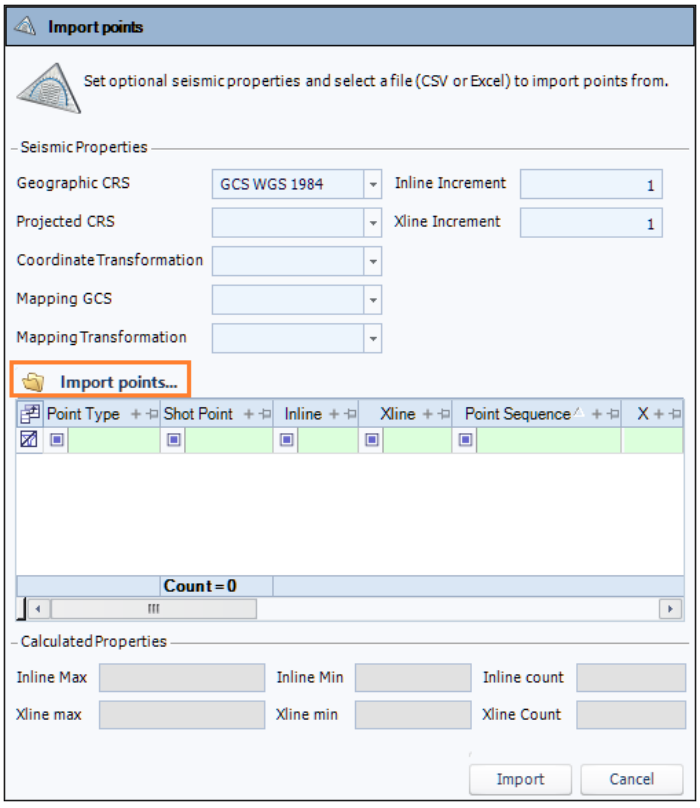
1. Select the target record in the **Seismic** grid.
2. Open the **Geometry** tab in **Related Records**.
3. Click **Import Points**.



4. The **Import Points** window opens.



5. Enter the navigation datum, projection and coordinate transformation.
   If you are loading 3D data, set the inline and xline increments.
6. Click **Import Points** and navigate to the location on your PC for the CSV or Excel file.



7. Select the file and click **Open**. The import detail displays in the grid in the **Import Points** window.

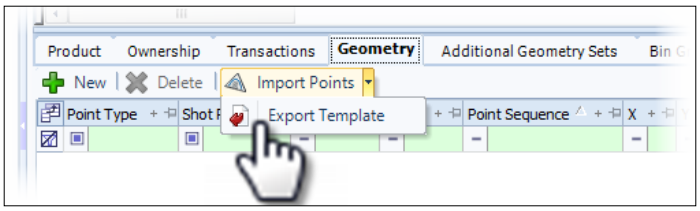
8. Verify that the information is correct and click **Import**. The information imports to the points grid.
9. Click **Save**.

If you have a large amount of Geometry to enter for a record and you try and enter it manually it can be time consuming and there is chance for error.

To minimize that chance for error, you can create enter the data for Geometric Sets into an Excel® spreadsheet and then use **Import Points** to add the data.

To help you format the data correctly for the import, you can download a template to enter the data in.

1. From the toolbar, expand the **Import Points** menu then select **Export Template**.



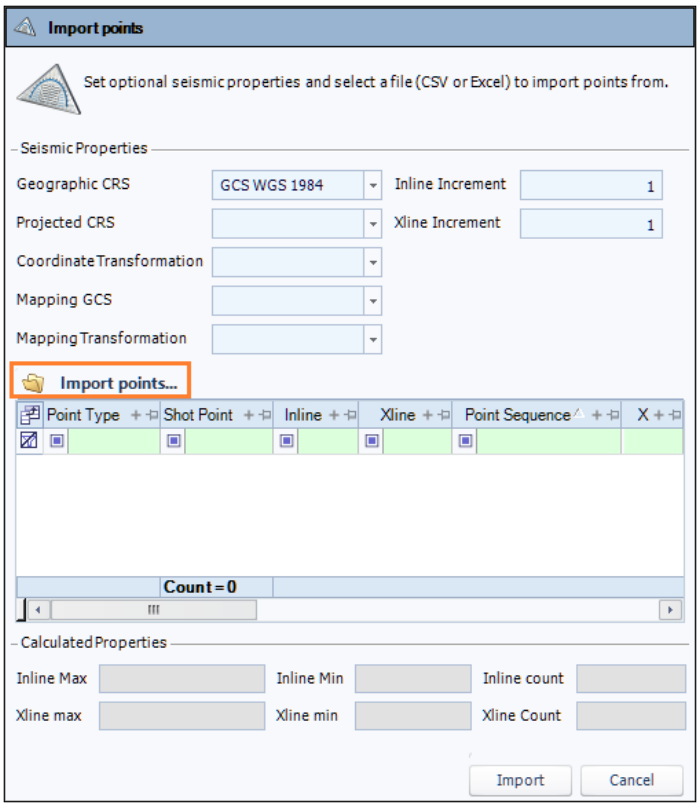
2. From the Save dialog navigate where you would like to save the template. If needed, enter a new name for the file.
3. Click **Save**.
4. After a few seconds the file will open in Excel.

> **Note:**
> When Exporting a Template, the Template file is generated with any data that is populating the grid. If there is any data in the file, you can delete it. Make sure to leave the column headings.

Enter your data into the worksheet then save it.

To import points for a seismic record:

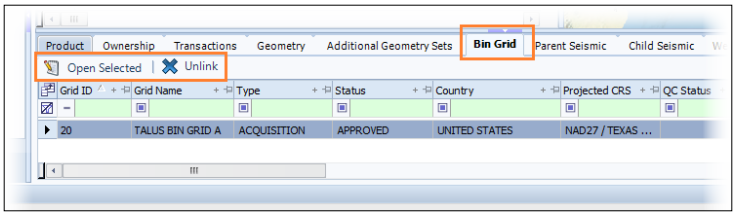
1. Select the target record in the **Seismic** grid.
2. Open the **Geometry** tab in **Related Records**.
3. Click **Import Points**. The **Import Points** window opens.
4. Enter the navigation datum, projection and coordinate transformation.
   If you are loading 3D data, set the inline and xline increments.
5. Click **Import Points** and navigate to the location on your PC for the CSV or Excel file.



6. Select the file and click **Open**. The import detail displays in the grid in the **Import Points** window.
7. Verify that the information is correct and click **Import**. The information imports to the points grid.
8. Click **Save**.

Viewing bin grid detail

The **Bin Grid** tab in the **Related Records** lists the bin grid associated to the item that is selected in the **Seismic** grid. The list provides a quick view of the bin grid details including the projected CRS and inline and crossline information.



For access to the bin grid in an editable format, select the row then click **Open Selected**. The bin grid will open.

To unlink a bin grid, select the row and click **Unlink**.

Assigning parent seismic

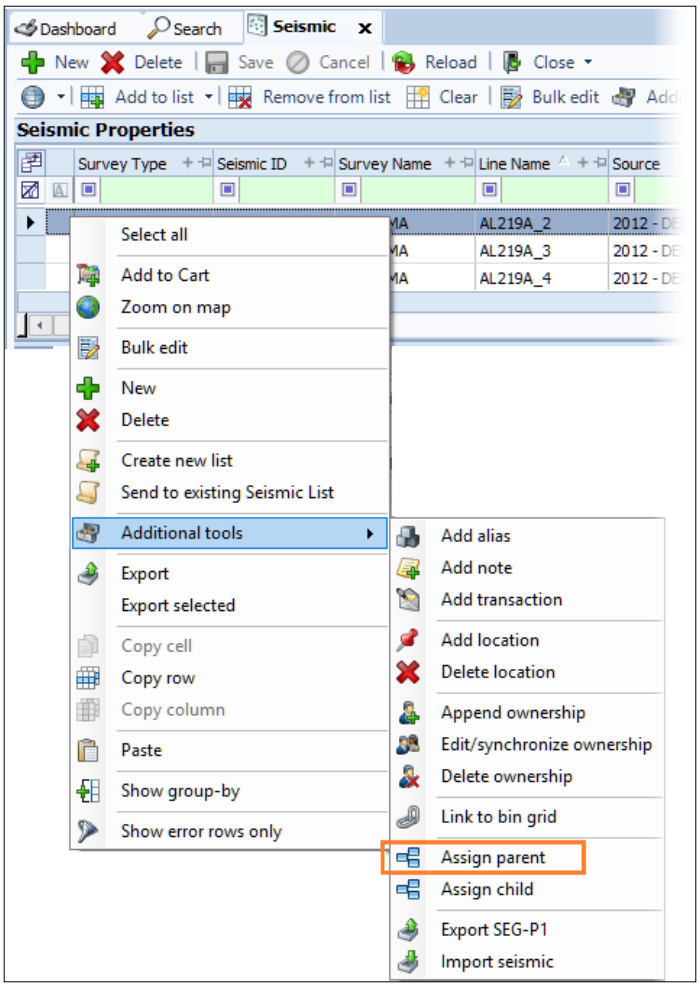
The **Parent Seismic** tab lists the seismic that a selected seismic record is derived from.

Use the main **Seismic** grid to assign a parent seismic and use the **Parent Seismic** tab to view the results.

Exploration Archives accommodates a many-to-many relationship for parent and Related Records. A parent record can have multiple children and a child record can have multiple parents.

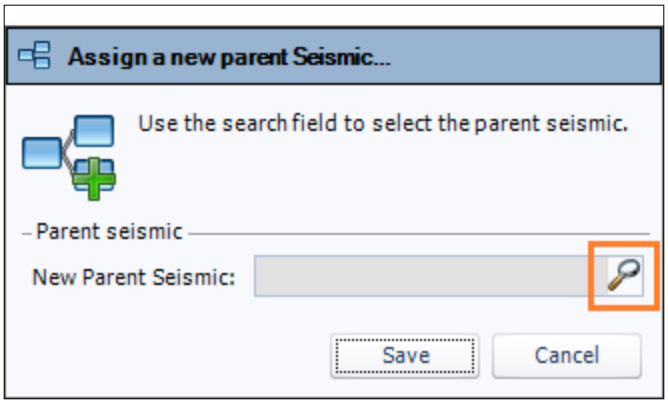
To assign a parent to one or more items:

1. Use one of the following methods to select the item(s) in the **Seismic** to create a parent relationship:
   - Click to select a single row.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
   - To select multiple individual rows, press Ctrl while clicking to select.
2. Right-click on a selected row to open the context menu.
3. Point to **Additional tools>Assign parent** .



The **Assign parent seismic** window opens.

4. Either select an item in the grid or search for the parent item(s) to assign and select.



If you select an item in the grid, that item will become the parent of the others in the **Seismic**.

If you search and select an item, the new item will become the parent of the others in the **Seismic**.

5. Click **Save**.
The assigned parent record displays in the associated tab in the **Related Records** panel.

Assigning child seismic

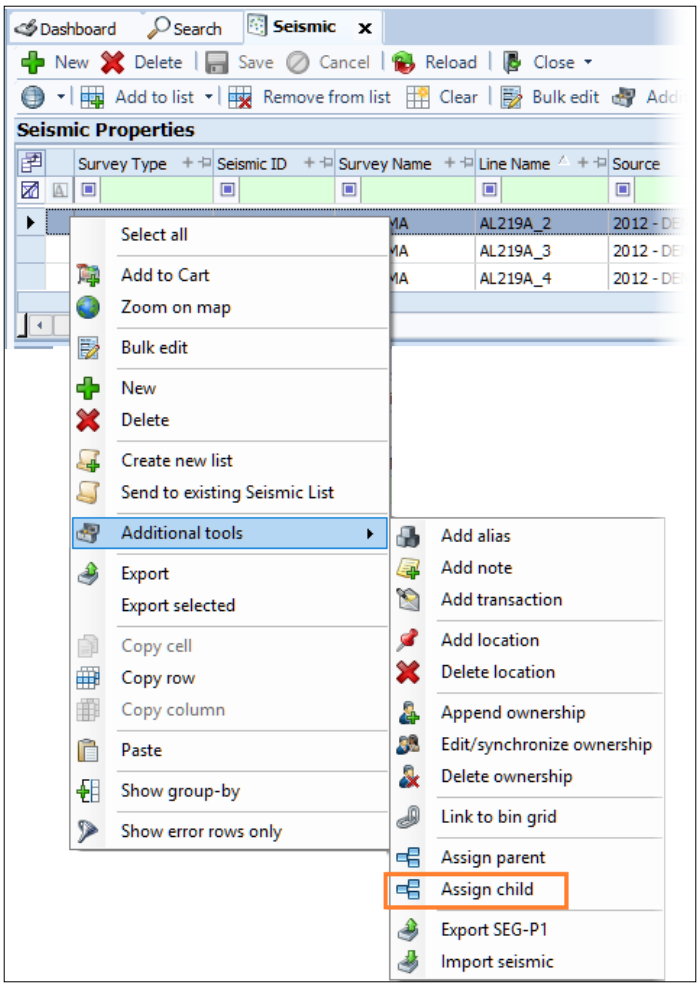
The **Child Seismic** tab lists the derived seismic of the seismic selected in the main grid.

Use the main **Seismic** grid to assign a child seismic and use the **Child Seismic** tab to view the results.

Exploration Archives accommodates a many-to-many relationship for parent and Related Records. A parent record can have multiple children and a child record can have multiple parents.

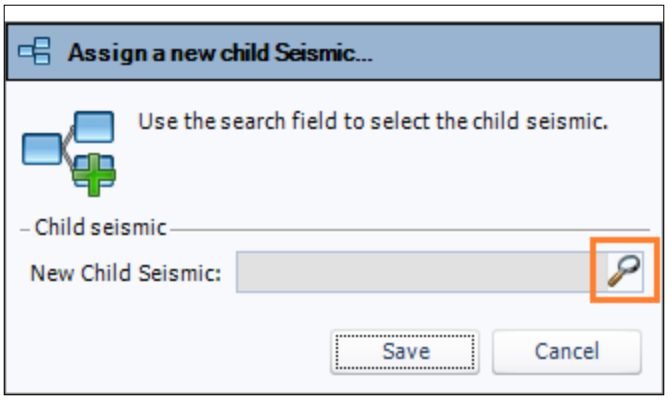
To assign a child to one or more items:

1. Use one of the following methods to select the item(s) in the **Seismic** to create a child relationship:
   - Click to select a single row.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
   - To select multiple individual rows, press Ctrl while clicking to select.
2. Right-click on a selected row to open the context menu.
3. Point to **Additional tools>Assign child**.



The **Assign child seismic** window opens.

4. Either select an item in the grid or search for the child item(s) to assign and select.



If you select an item in the grid, that item will become the child of the others in the **Seismic**.

If you search and select an item, the new item will become the child of the others in the **Seismic**.

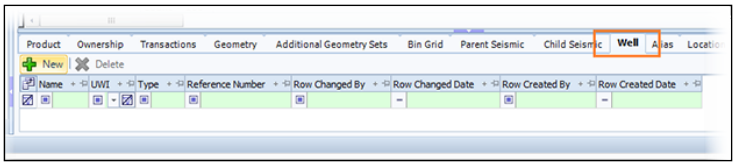
5. Click **Save**.
The assigned child record displays in the associated tab in the **Related Records** panel.

Add well detail

The **Wells** tab provides a record of wells associated with either Microseismic or Vertical Seismic Profile (VSP).

To add a well detail to a seismic record:

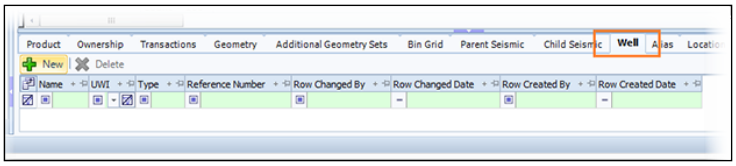
1. Select the seismic record in the **Seismic Properties**grid.
2. In the **Related Records** panel click the **Wells** tab.
3. Click **New** to add a row to the grid.
4. Enter the relevant well information in the new row.



The **Wells** tab provides a record of wells associated with either Microseismic or Vertical Seismic Profile (VSP).

To add a well detail to a seismic record:

1. Select the seismic record in the **Seismic Properties**grid.
2. In the **Related Records** panel click the **Wells** tab.
3. Click **New** to add a row to the grid.
4. Enter the relevant well information in the new row.

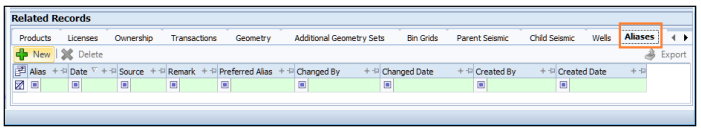


Add aliases

The **Aliases** tab displays previous names that a seismic record may have been assigned.

To add a new alias to a seismic record:

1. Select the record in the **Seismic Properties** grid.
2. In the Related Records panel click the **Aliases** tab.

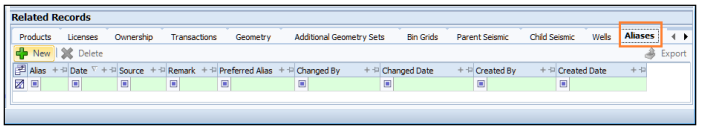


3. Click **New**.
4. Enter the Alias, and information for the other columns if needed.
5. Click **Save**.

The **Aliases** tab displays previous names that a seismic record may have been assigned.

To add a new alias to a seismic record:

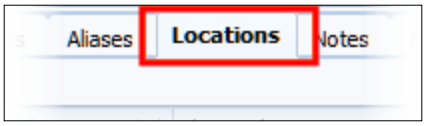
1. Select the record in the **Seismic Properties** grid.
2. In the Related Records panel click the **Aliases** tab.



3. Click **New**.
4. Enter the Alias, and information for the other columns if needed.
5. Click **Save**.

Add location detail

The **Locations** tab displays the location information associated to the selected record.



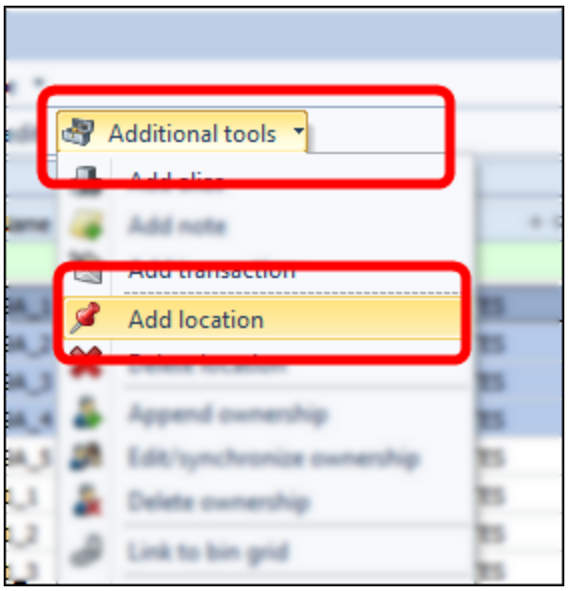
To add a new location to a single record:

1. Select the record in the **Seismic Properties** grid.
2. Open the **Locations** tab then click **New**.
3. Select the **Location Type** and the **Location Name** from the drop-down menu.
4. Click **Save**.

To add a shared location to multiple records, you can use the **Additional tools** menu.

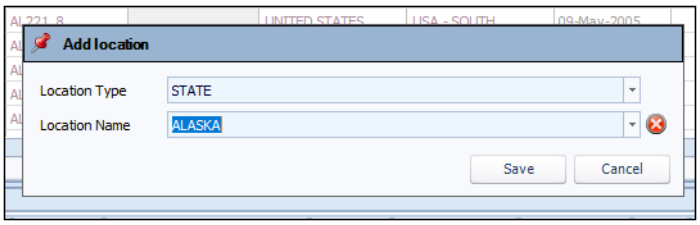
To add a shared location:

1. Select the records in the **Seismic** grid.
2. On the Toolbar click **Additional tools** and select **Add location**.



Tip: You can also right-click to open the context menu and then select **Additional Tools>Add Location**

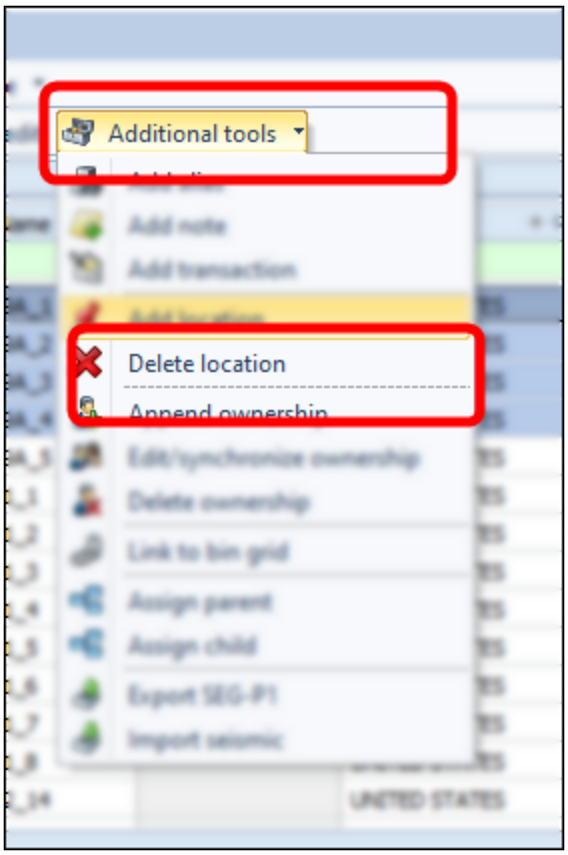
The **Add location** window opens.



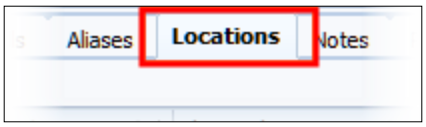
3. Select the **Location Type** and the **Location Name**.
4. Click **Save**.
   The location saves to the **Locations** tab for each selected record.

Note:
If you want, you can use the steps listed above to add a location to a single record.

To delete a location, use the same process as described, using **Delete location** option.



The **Locations** tab displays the location information associated to the selected record.



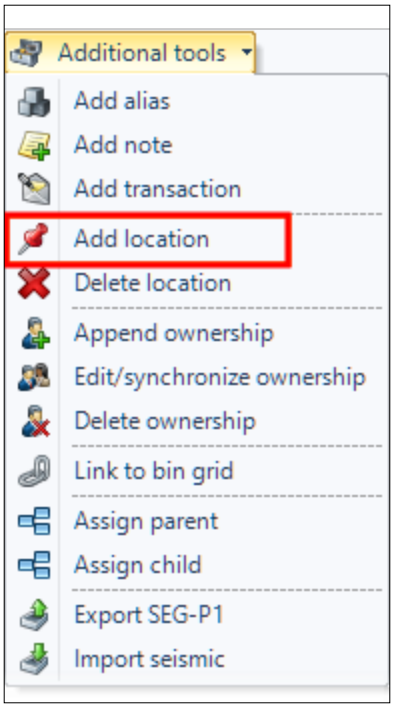
To add a new location to a single record:

1. Select the record in the **Seismic Properties** grid.
2. Open the **Locations** tab then click **New**.
3. Select the **Location Type** and the **Location Name** from the drop-down menu.
4. Click **Save**.

To add a shared location to multiple records, you can use the **Additional tools** menu.

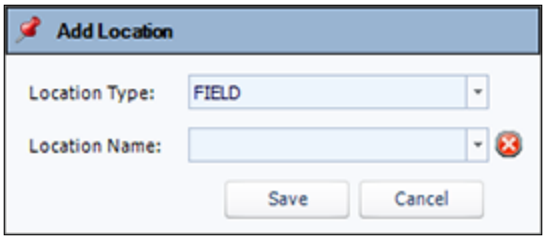
To add a shared location:

1. Select the records in the **Seismic** grid.
2. On the Toolbar click **Additional tools** and select **Add location**.



Tip: You can also right-click to open the context menu and then select **Additional Tools>Add Location**

The **Add location** window opens.



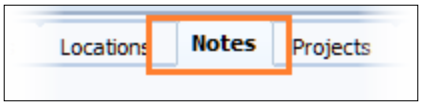
3. Select the **Location Type** and the **Location Name**.
4. Click **Save**.
   The location saves to the **Locations** tab for each selected record.

Note:
If you want, you can use the steps listed above to add a location to a single record.

To delete a location, use the same process as described, using the **Delete location** option.

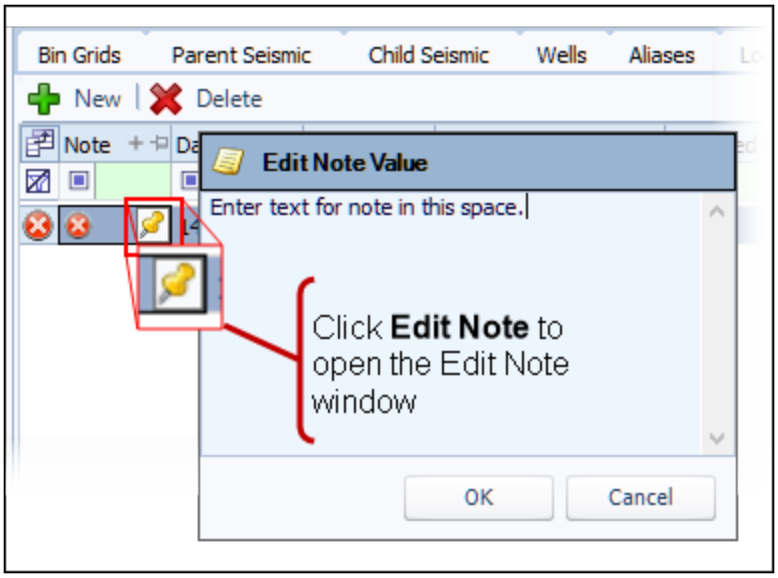
Add notes

Use the **Notes** tab for adding notes associated to individual items or to multiple items. The notes are available to other users to review.



To add a note to a single record:

1. Select the record in the **Seismic Properties**grid.
2. Open the **Notes** tab and click **New**.
3. Click the **edit note** icon in the **Note** column to open the text entry window.



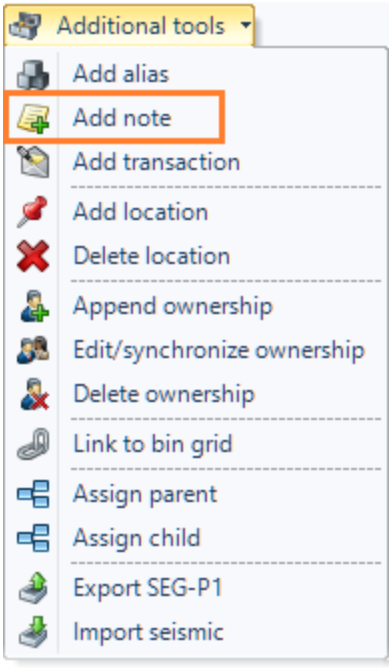
4. Enter the text for your note and click **OK**.

You can use **Additional tools** to add a shared note for multiple items.

To add a shared note:

Note:
You can also use the following procedure to add a note to a single record.

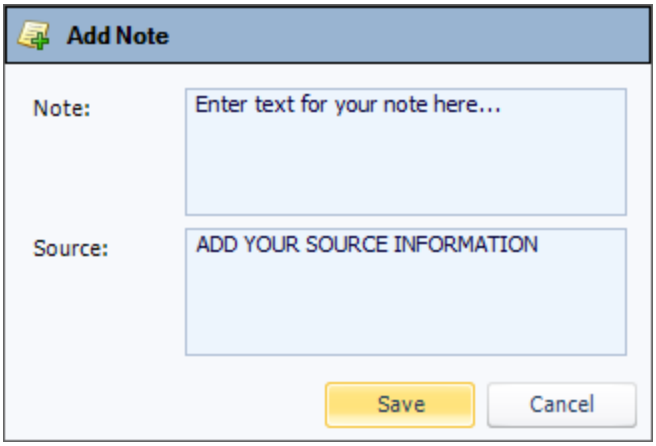
1. Select the records in the **Seismic Properties** grid.
2. Click **Additional tools** and select **Add note**.



> **Tip:** You can also right-click to open the context menu and select **Additional Tools>Add Note**.

The **Add note** window opens.

3. Enter note **Details** and the **Source** information if applicable.
4. Click **Save**.
The note saves to the **Note** tab for each selected record.

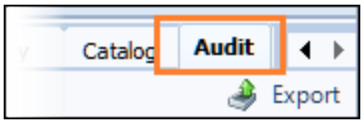


Viewing audit detail

The **Audit** tab provides the history of the seismic metadata.

To view the audit details of a particular seismic record:

1. Select the record in the **Seismic Properties** grid.
2. On the Related Records panel click the **Audit** tab. The audit grid displays the detailed information associated to the selected seismic.



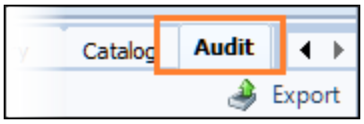
3. Click **Export**.
4. The information in the grid will be compiled into an Excel® file.

5. When the Save panel appears, navigate to where you want to save the file.
6. Click **Save**.
7. A confirmation dialog appears .
8. Click **OK**.
9. After a few seconds the file will open in Excel.

The **Audit** tab provides the history of the seismic metadata.

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1. Select the record in the **Seismic Properties** grid.
2. On the Related Records panel click the **Audit** tab. The audit grid displays the detailed information associated to the selected seismic.



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5. When the Save panel appears, navigate to where you want to save the file.
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Adding seismic navigation

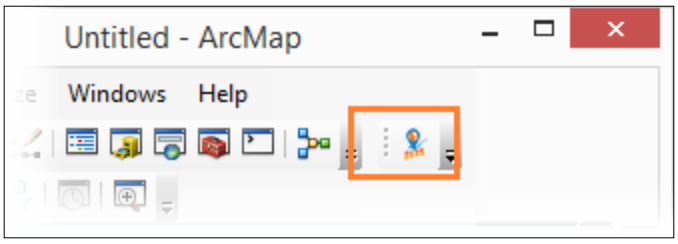
Exploration Archives Tools for ArcMap® is a plug-in for loading geometry into Exploration Archives. Exploration Archives Tools for ArcMap® communicates with Esri® ArcGIS Pro™ to load new seismic geometry or replace existing geometry.

The following is required for using Exploration Archives Tools for ArcMap®:

- Esri ArcGIS Pro 3.x
- Shape file (.shp) or csv file accessible for loading into ArcMap
- Installation of Exploration Archives Tools for ArcMap
- Access to Exploration Archives

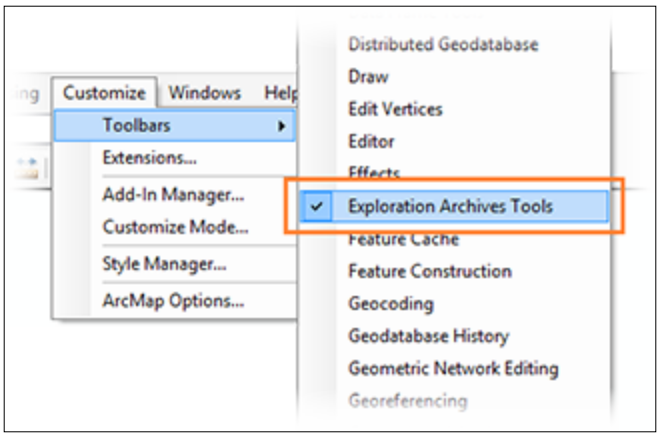
To open Tools for ArcMap®:

1. Open Esri ArcMap.
2. Load the points into ArcMap using a file type that ArcMap supports. If you want to load selected features, select the features using the ArcMap selection tool.
3. Click the Exploration Archives icon in the toolbar to open Tools.



4. The Exploration ArchivesTools for ArcMap® opens in a new window.

To activate the Exploration Archives icon in ArcMap, click **Customize** in the ArcMap menu bar. Point to **Toolbars** and select **Exploration Archives Tools**.



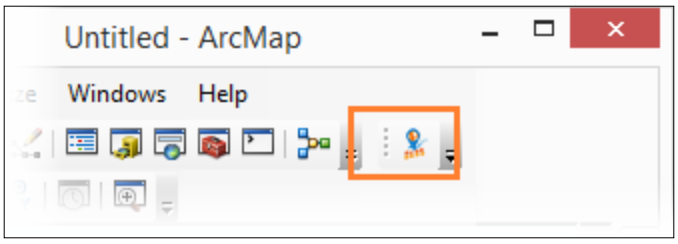
Exploration Archives Tools for ArcMap® is a plug-in for loading geometry into Exploration Archives. Exploration Archives Tools for ArcMap® communicates with Esri® ArcMap™ to load new seismic geometry or replace existing geometry.

The following is required for using Exploration Archives Tools for ArcMap®:

- Esri® ArcMap® 10.4 – 10.6
- Esri ArcGIS Pro 2.4 – 2.6
- Shape file (.shp) or csv file accessible for loading into ArcMap
- Installation of Exploration Archives Tools for ArcMap
- Access to Exploration Archives

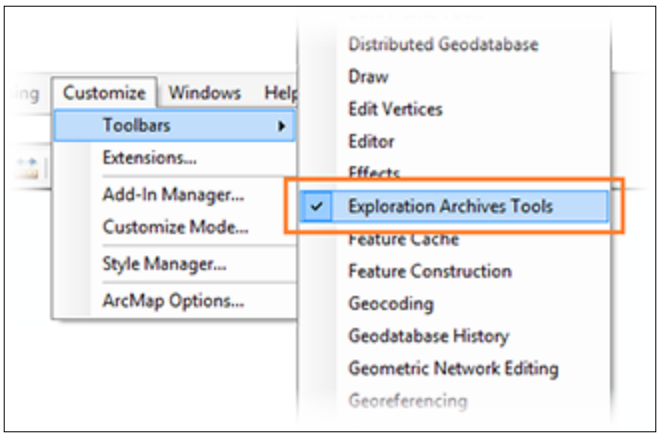
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3. Click the Exploration Archives icon in the toolbar to open Tools.



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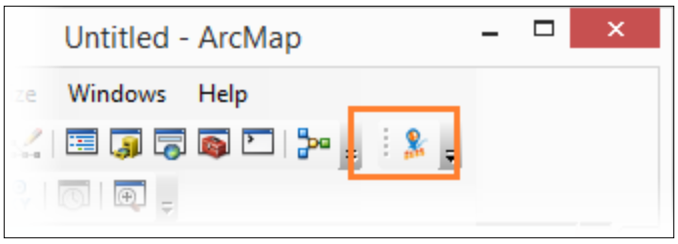
Exploration Archives Tools for ArcMap® is a plug-in for loading geometry into Exploration Archives. Exploration Archives Tools for ArcMap® communicates with Esri® ArcMap™ to load new seismic geometry or replace existing geometry.

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- Installation of Exploration Archives Tools for ArcMap
- Access to Exploration Archives

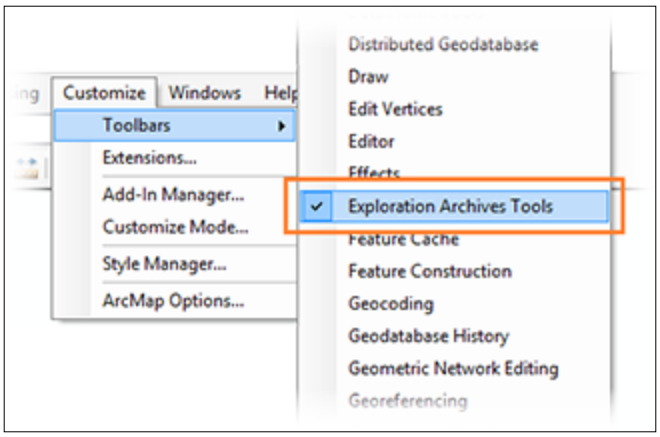
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1. Open Esri ArcMap.
2. Load the points into ArcMap using a file type that ArcMap supports. If you want to load selected features, select the features using the ArcMap selection tool.
3. Click the Exploration Archives icon in the toolbar to open Tools.



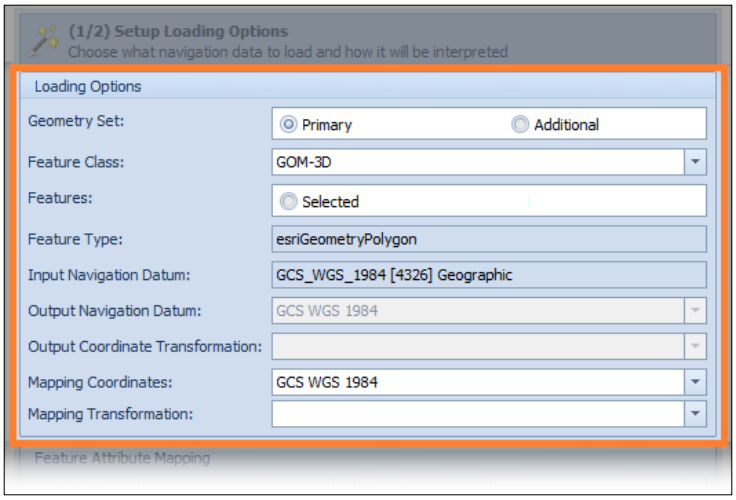
4. The Exploration Archives Tools for ArcMap® opens in a new window.

To activate the Exploration Archives icon in ArcMap, click **Customize** in the ArcMap menu bar. Point to **Toolbars** and select **Exploration Archives Tools**.



Set the loading options

After opening Tools for ArcMap®, enter the appropriate detail for the **Loading Options** and **Feature Attribute Mapping** sections.



Select the **Loading Options**:

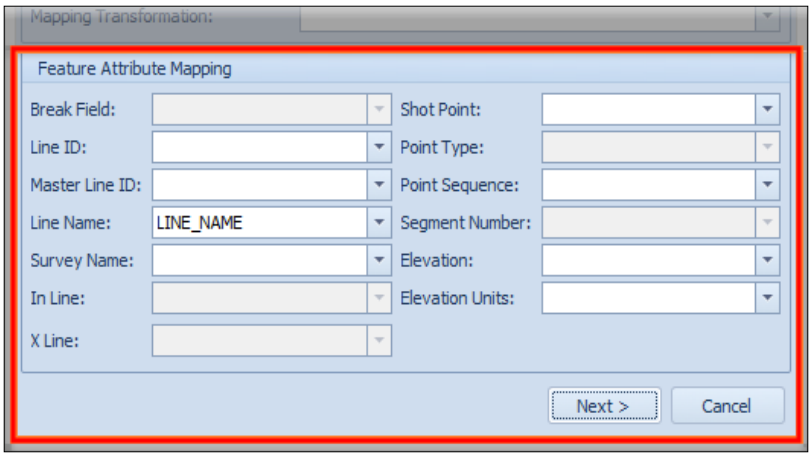
- **Geometry Set**: Select **Primary** if you are loading a main geometry set. Select **Additional** if you are loading an additional set.
- **Feature Class**: Select the feature class from the drop-down options.
- **Features**: Select **Selected** if you are loading selected features from the layer. Select **All** if you are loading the entire layer.
- **Feature Type**: Auto-generates based on the input file.
- **Input Navigation Datum**: Exploration Archives detects and populates the coordinate reference system (CRS) through ArcMap.
  If the EPSG code in the brackets is not greater than zero [0], contact your system administrator. The error may be a result of the following:
  - For shape files, the PROJCS name in the .prj file must match exactly to the name in ArcMap
  - Custom projections must be defined by your administrator
- **Output Coordinate Transformation**: Optional, select if required.
- **Mapping Coordinates**: This field is optional and may not be available in your instance of Tools. The default entry populates the geographic coordinate system (GCS) that is set in Exploration Archives. Typically, the GCS default is WGS 84.
- **Mapping Transformation**: This field is optional and may not be available in your instance of Tools.
  Select the appropriate mapping transformation from the drop-down. Contact your geomatics administrator if the transformation is not available.

Specifying the Feature Attribute Mapping

The mapping options that you set will assign attributes from the file to the Exploration Archives column names.

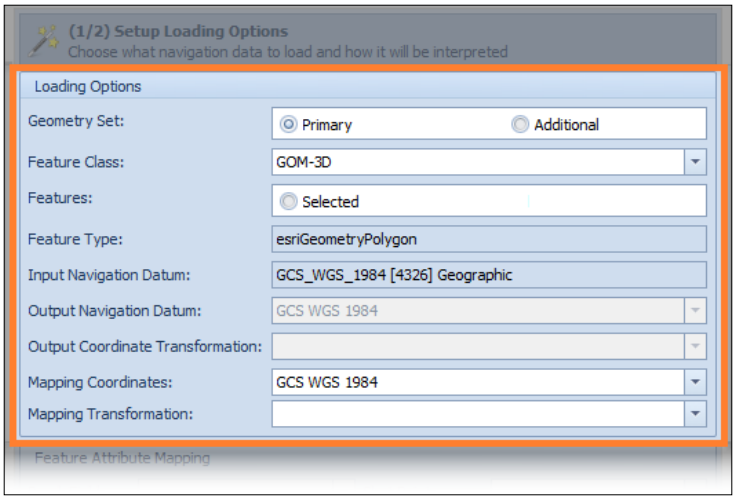
Set the corresponding attributes for each feature relevant to your file.

After setting the import options and mapping the attribute features, click **Next** and refer to "Setting metadata for loading navigation" on page 110 for instructions.



Note:
The **Break Field** sets the segregation, or grouping of points into a line or polygon.

After opening Tools for ArcMap®, enter the appropriate detail for the **Loading Options** and **Feature Attribute Mapping** sections.



Select the **Loading Options**:

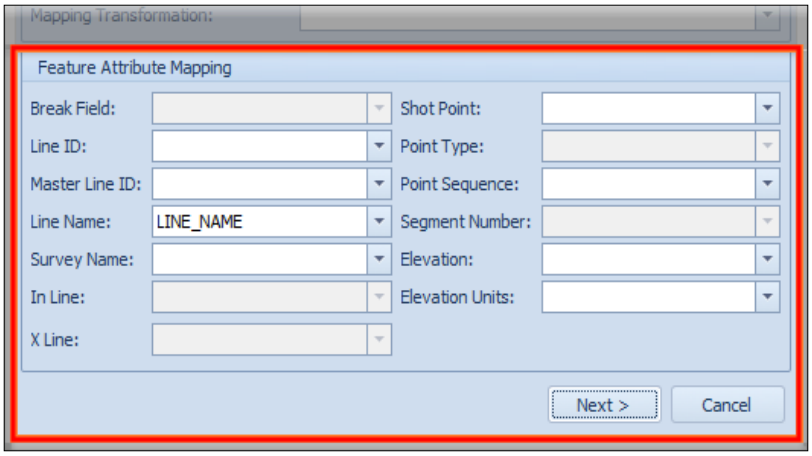
- **Geometry Set**: Select **Primary** if you are loading a main geometry set. Select **Additional** if you are loading an additional set.
- **Feature Class**: Select the feature class from the drop-down options.
- **Features**: Select **Selected** if you are loading selected features from the layer. Select **All** if you are loading the entire layer.
- **Feature Type**: Auto-generates based on the input file.
- **Input Navigation Datum**: Exploration Archives detects and populates the coordinate reference system (CRS) through ArcMap.
  If the EPSG code in the brackets is not greater than zero [0], contact your system administrator. The error may be a result of the following:
  - For shape files, the PROJCS name in the .prj file must match exactly to the name in ArcMap
  - Custom projections must be defined by your administrator
- **Output Coordinate Transformation**: Optional, select if required.
- **Mapping Coordinates**: This field is optional and may not be available in your instance of Tools. The default entry populates the geographic coordinate system (GCS) that is set in Exploration Archives. Typically, the GCS default is WGS 84.
- **Mapping Transformation**: This field is optional and may not be available in your instance of Tools.
  Select the appropriate mapping transformation from the drop-down. Contact your geomatics administrator if the transformation is not available.

Specifying the Feature Attribute Mapping

The mapping options that you set will assign attributes from the file to the Exploration Archives column names.

Set the corresponding attributes for each feature relevant to your file.

After setting the import options and mapping the attribute features, click **Next** and refer to "Setting metadata for loading navigation" on the next page for instructions.



Note: The **Break Field** sets the segregation, or grouping of points into a line or polygon.

Setting metadata for loading navigation

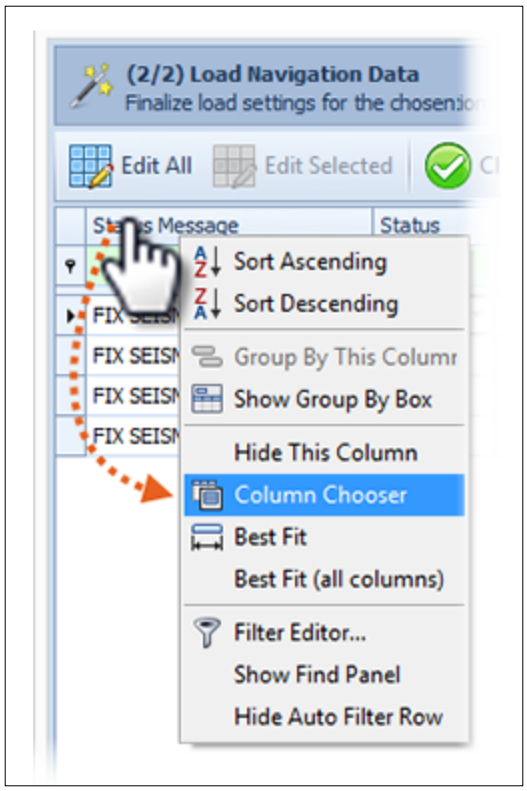
The second step for loading navigation with Exploration Archives Tools for ArcMap® is to further define the metadata. Metadata is the underlying definition of your data and makes it easier to find and work with in Exploration Archives.

The grid that populates at this step has columns with data categories specific for your company. Use the fields in the grid to perform individual edits for the categories. For bulk edits, use **Edit All** or **Edit Selected**.

A red x indicates required fields and data errors. Add the required information and correct any errors.

To customize the grid...

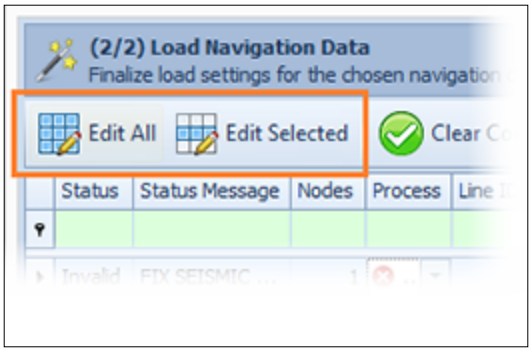
- Drag and drop column headers to your preferred locations.
- Right-click on the header row to select the **Column Chooser**.



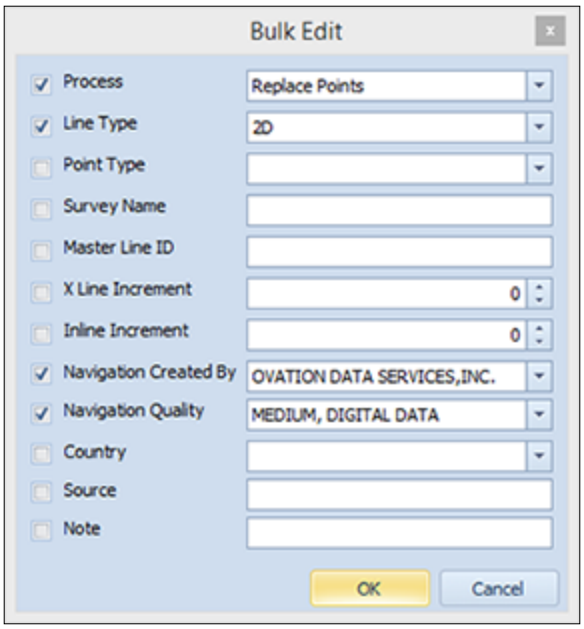
- Right-click on the header row to view additional grid layout options.
- Click and drag the lower right corner to resize the window.

To perform bulk edits...

If you have multiple records that require the same edits, select each row and click **Edit Selected**. To edit all records in the grid click **Edit All**.



The **Bulk Edit** window opens.



Check the data categories you want to edit and select or enter the new detail.

The fields and processes for setting the metadata for primary geometry and additional geometry sets are specific for each set.

For primary geometry, refer to "Selecting a Process for primary geometry" on the next page.

For additional geometry refer to "Selecting a Process for additional geometry" on page 116.

Defining primary geometry

To load data for a primary geometry to Exploration Archives, the metadata definitions must be set correctly. Use the grid in the **Load Navigation Data** window to specify details. To specify the same metadata for multiple records, use **Bulk Edit**. Click **Edit All** or **Edit Selected** to open the **Bulk Edit** window and enter the information in the appropriate fields.

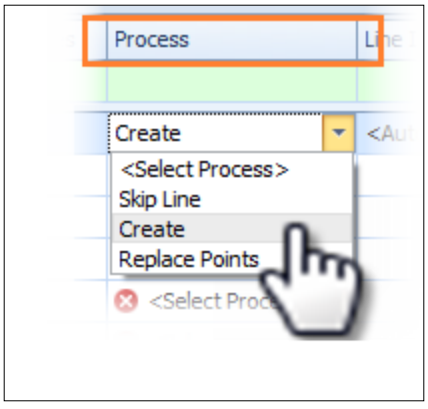
Some of the categories include:

- **Status**: Displays the status of your data load.
- **Status Message**: Provides additional status information.
- **Process**: Select the process to use when loading the navigation (Skip, Create or Replace Points).
- **Seismic ID**: Enter the ID in the **Seismic ID** column and click out of the field. If a red x displays, the ID does not exist.
- **InLine** and **X Line**: For 3D data imports, these columns are available if the attribute mapping was set in the previous step. Enter the increment values for **In Line** and **X Line** . These load to Exploration Archives to calculate inline and crossline minimums, maximums and counts.
- **Source**: If you leave the **Source** field blank, Exploration Archives displays the source as 'ArcMap.AddIn'.
- **Note**: Details entered in the **Note** field display in the **Seismic** module of Exploration Archives (**Note** tab in **Related Records**).

Selecting a Process for primary geometry

Tools for ArcMap provides processing types for creating new seismic, replacing points, and skipping seismic when loading data.

Select the appropriate process for each item:



- **Skip Line**: Omits the seismic during the data load.
- **Create**: Creates new seismic data information. Exploration Archives generates a new seismic ID during the upload.

- **Replace Points**: Replaces points if the seismic exists in Exploration Archives.
  Use **Replace Points** only if the new navigation is a higher quality than the existing navigation, or if the existing seismic does not have navigation.

Replacing primary geometry

Using the **Replace Points** process updates the points for seismic that already exists in Exploration Archives. Use this process if the new navigation is a higher quality than the existing navigation, or if the existing seismic does not have navigation.

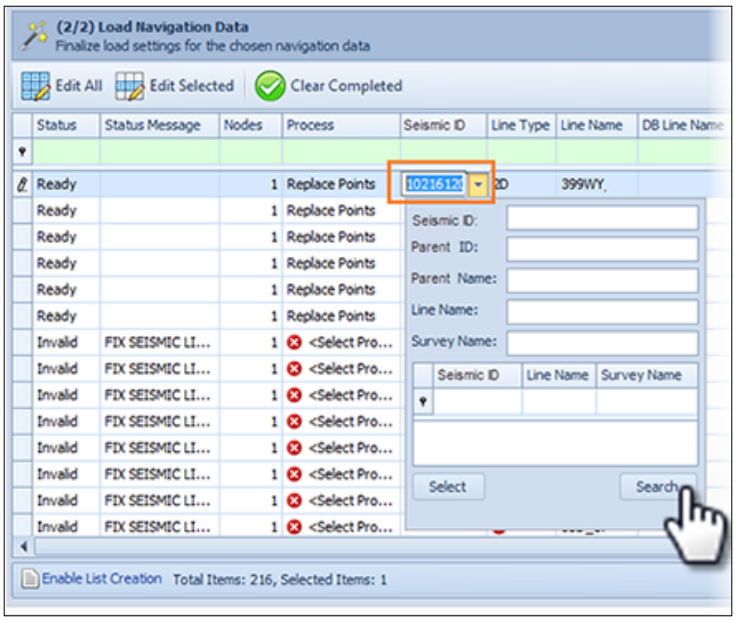
With the **Replace Points** process, Tools for ArcMap uses **Seismic Name**, or **Seismic Name** and **Survey Name** to match the existing seismic in Exploration Archives. If this information is not in the original input file, use the search function.

Refer to the Feature Attribute Mapping information in "Specifying the Feature Attribute Mapping" on page 107 to verify the mapping.

In the Tools for ArcMap grid, the **Seismic ID** and **Seismic Type** populate automatically when you select **Replace Points** as the process. These fields auto-populate only if the seismic already exists in the database, and if only one match is detected. If the seismic exists in Exploration Archives and the ID does not populate, use the search function to find the seismic.

To search for the seismic ID:

1. Click the down arrow in the **Seismic ID** cell to open the **Search** panel.
2. Enter the search criteria and click **Search**.
3. In the results panel, double-click the item that requires the points to be replaced.



Using the **Replace Points** process updates the points for seismic that already exists in Exploration Archives. Use this process if the new navigation is a higher quality than the existing navigation, or if the existing seismic does not have navigation.

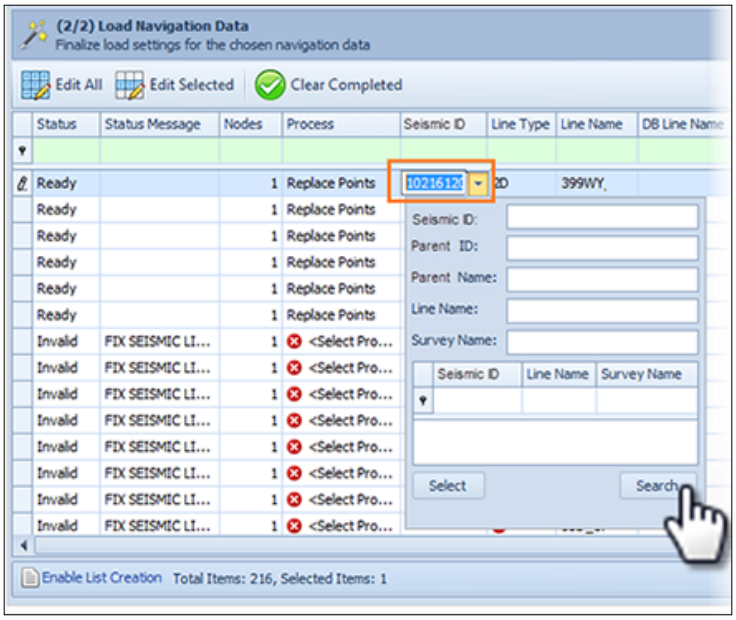
With the **Replace Points** process, Tools for ArcMap uses **Seismic Name**, or **Seismic Name** and **Survey Name** to match the existing seismic in Exploration Archives. If this information is not in the original input file, use the search function.

Refer to the Feature Attribute Mapping information in "Specifying the Feature Attribute Mapping" on page 107 to verify the mapping.

In the Tools for ArcMap grid, the **Seismic ID** and **Seismic Type** populate automatically when you select **Replace Points** as the process. These fields auto-populate only if the seismic already exists in the database, and if only one match is detected. If the seismic exists in Exploration Archives and the ID does not populate, use the search function to find the seismic.

To search for the seismic ID:

1. Click the down arrow in the **Seismic ID** cell to open the **Search** panel.
2. Enter the search criteria and click **Search**.
3. In the results panel, double-click the item that requires the points to be replaced.



Defining additional geometry

Note: The main seismic attributes do not update when loading additional geometry.

To load data as additional geometry to Exploration Archives, the metadata definitions must be set correctly. Use the grid in the **Load Navigation Data** window to specify details. To specify the same metadata for multiple records, use **Bulk Edit**. Click **Edit All** or **Edit Selected** to open the **Bulk Edit** window and enter the information in the appropriate fields.

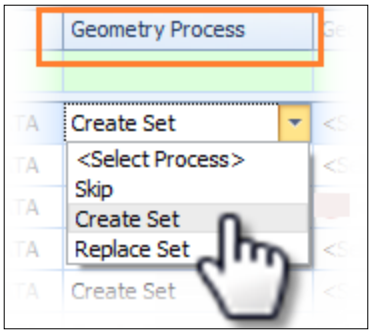
Some of the categories include:

- **Status**: Displays the status of your data load.
- **Status Message**: Provides additional status information.
- **Geometry Process**: Select the process to use for loading additional geometry (Skip, Create Set or Replace Set).
- **Seismic ID**: Enter the ID in the **Seismic ID** column and click out of the field. If a red x displays, the ID does not exist.
- **Geometry Set**: Auto-populates if you are creating a new additional geometry set (**Geometry Process** is set to **Create Set**).
- **Geometry Set Type**: Select the type of geometry.
- **InLine** and **X Line**: If you mapped the **InLine** and **X Line** values in the previous window, the new additional geometry set will include the inline and crossline with the update. However, since you are creating or replacing *additional* geometry, the *main* seismic attributes inline and crossline minimums, maximums, counts and increments do not update.
- **Note**: Details entered in the **Note** field display in the **Seismic** module of Exploration Archives (**Note** tab in **Related Records**).

Selecting a Process for additional geometry

Tools for ArcMap provides processing types for creating additional geometry, replacing geometry sets, and skipping seismic when loading data.

Select the appropriate process for each item:



- **Skip**: Omits the seismic during the data load.
- **Create Set**: Creates a new additional geometry set for the seismic specified.
- **Replace Set**: Replaces an additional geometry set.

Replacing additional geometry

Select Version:

Note:
The main seismic attributes do not update when replacing additional geometry.

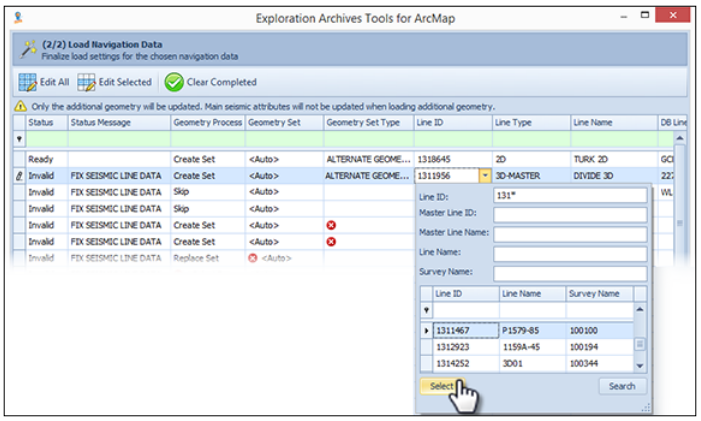
Using the **Replace Set** process replaces the additional geometry set in Exploration Archives.

With the **Replace Set** process, Tools for ArcMap uses **Seismic Name**, or **Seismic Name** and **Survey Name** to match the existing seismic in Exploration Archives. If this information is not in the original input file, use the search function. Refer to the Feature Attribute Mapping information in "Specifying the Feature Attribute Mapping" on page 107 to verify the mapping.

In the Tools for ArcMap grid, the **Seismic ID** and **Seismic Type** populate automatically when you select **Replace Points** as the process. These fields auto-populate only if the seismic already exists in the database, and if only one match is detected. If the seismic exists in Exploration Archives and the ID does not populate, use the search function to find the seismic.

To search for the seismic ID:

1. Click the down arrow in the **Seismic ID** cell to open the **Search** panel.
2. Enter the search criteria and click **Search**.
3. In the results panel, double-click the item that requires the points to be replaced.



Note:
The main seismic attributes do not update when replacing additional geometry.

Using the **Replace Set** process replaces the additional geometry set in Exploration Archives.

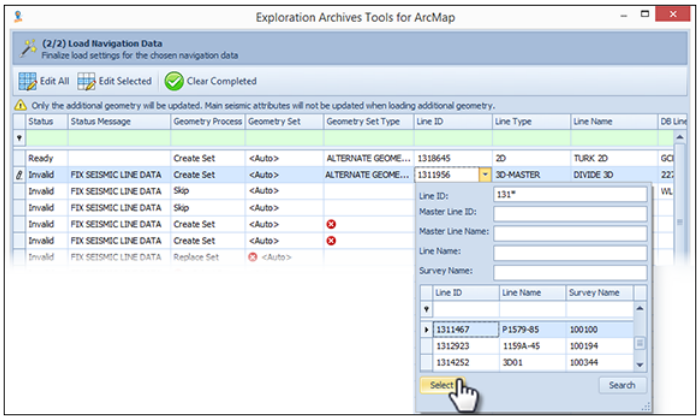
With the **Replace Set** process, Tools for ArcMap uses **Seismic Name**, or **Seismic Name** and **Survey Name** to match the existing seismic in Exploration Archives. If this information is not in the original input file, use the search function. Refer to the Feature Attribute Mapping information in "Specifying the Feature Attribute Mapping" on page 107 to verify the mapping.

In the Tools for ArcMap grid, the **Seismic ID** and **Seismic Type** populate automatically when you select **Replace Points** as the process. These fields auto-populate only if the seismic already exists in the database, and if only one match is detected. If the seismic exists in Exploration Archives and the ID does not populate, use the search function to find the seismic.

To search for the seismic ID:

1. Click the down arrow in the **Seismic ID** cell to open the **Search** panel.
2. Enter the search criteria and click **Search**.

3. In the results panel, double-click the item that requires the points to be replaced.

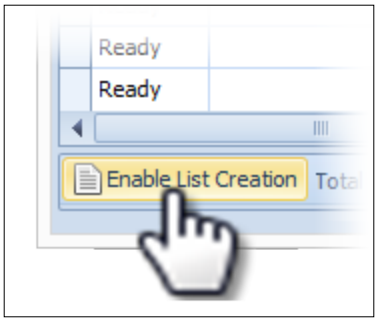


Loading navigation data

Items that meet the required criteria for loading navigation data to Exploration Archives have a **Status** of **Ready** in the loading grid. Exploration ArchivesTools for ArcMap will omit items that are not ready.

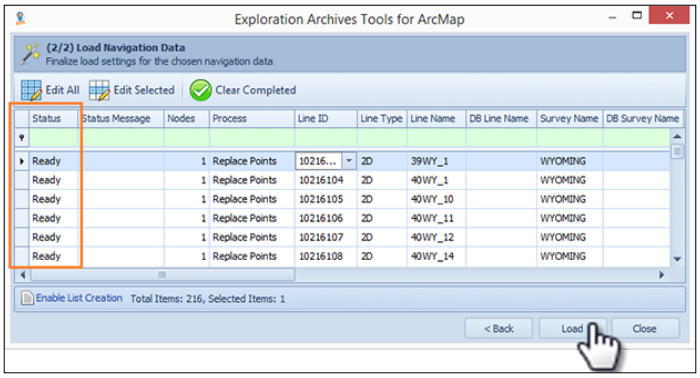
Note: A red x indicates the missing or incorrect information that must be fixed to be included in the load. Locate the errors and make the corrections accordingly.

If you want Exploration Archives to create a list of the new items for you to access, be sure to turn on **Enable List Creation** before clicking **Load**. For more information, refer to "Enabling List creation" on the next page.



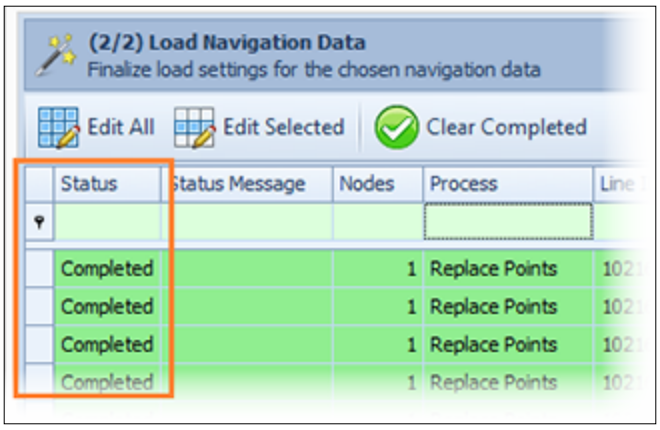
When you are satisfied with the status of the items, complete loading the navigation data:

1. Click **Load**. A confirmation message opens.



2. Click **Yes**. Items will begin to load into Exploration Archives. Depending on the size of the import, the process may take a few minutes.
3. A message opens indicating when the import is complete. Click **OK**.

   Items that loaded successfully display a **Completed** status and are highlighted in green. Exploration Archives will automatically draw the shape on the map.



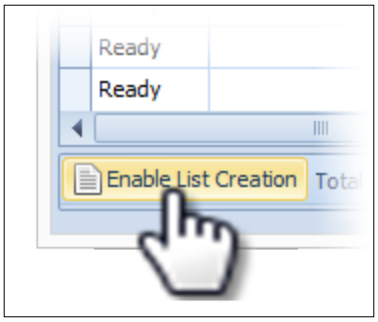
4. If you are finished working with the items in the grid, click **Close**.
   To display only the items that were not imported, click **Clear Completed**.

Enabling List creation

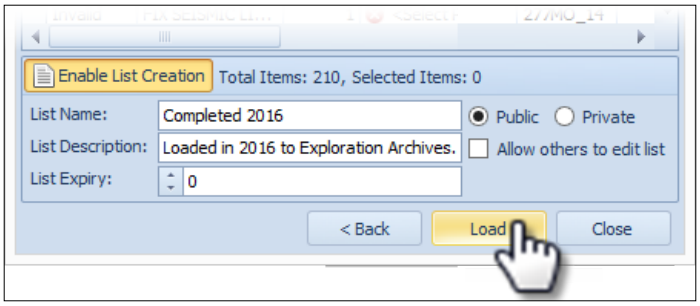
Exploration Archives will create a list of the new items for you to easily access the items. If **Enable List Creation** is activated, clicking **Load** loads the data and adds the **Completed** items to a List.

To enable list creation before loading the data:

1. Click **Enable List Creation**. The List options expand.



2. Enter a list name and description.



3. Select the list to be public or private, and whether others can edit or not.
4. Enter the number of days before a List Expires.
5. When you are satisfied with the status of the items and your list detail, click **Load** to complete loading the navigation data.

Export Shape File

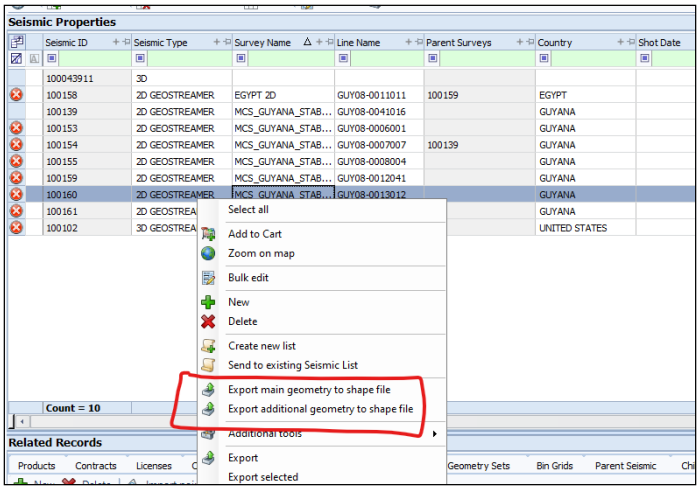
You can export IDs from the Seismic Properties grid to a shape file.

To export a shape file from the Seismic Properties panel:

1. Select one ID or multiple IDs on the grid.

> **Note:**
> If there are multiple Seismic IDs selected, each ID with the same PCS will be written into one file, and IDs with different PCS values will be written into their own file.

2. From the context menu select **Export main geometry to shape file**.



To export a shape file from the Related Records panel:

1. Highlight a record in the **Products>File View** child grid.

> **Note:**
> The file ID must have valid SEGY navigation instead of geometry

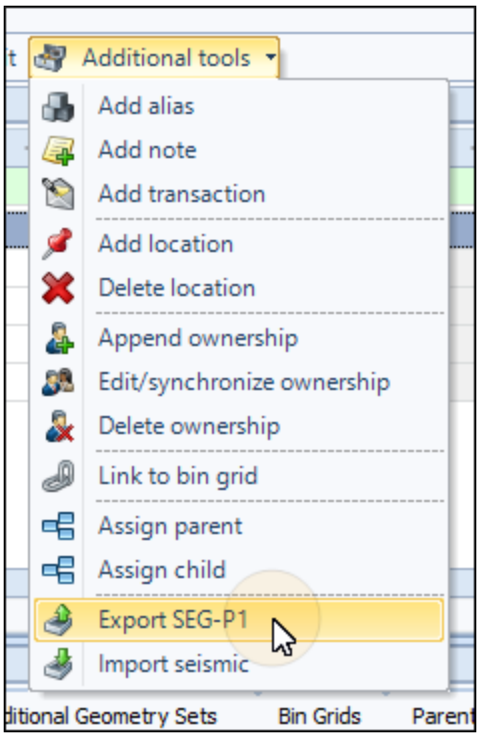
2. Right-click and select **Export SEG-Y navigation to shape file** from the context menu.

Export Seg-P1

The **Export Seg-P1** tool exports a Seg-P1 file based on the geometry of the seismic selected for export. The **Export Seg-P1** tool exports one file per coordinate reference system (CRS) with headers separating each seismic item.

To export seismic record to a Seg-P1 file:

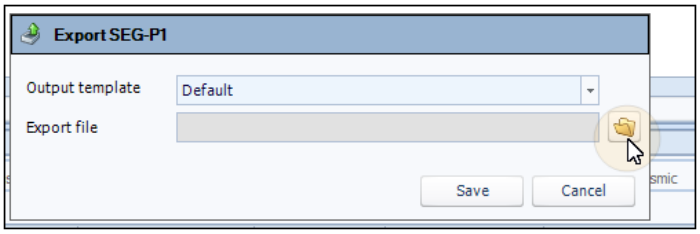
1. Select the target records in the **Seismic** grid.
2. Click **Additional Tools** and select **Export Seg-P1**.


Additional tools
Add alias
Add note
Add transaction
Add location
Delete location
Append ownership
Edit/synchronize ownership
Delete ownership
Link to bin grid
Assign parent
Assign child
Export SEG-P1
Import seismic
ditional Geometry Sets
Bin Grids
Parent

> **Tip:**
> Alternatively, you could right-click and select **Additional Tools>SEG-P1** from the context menu.

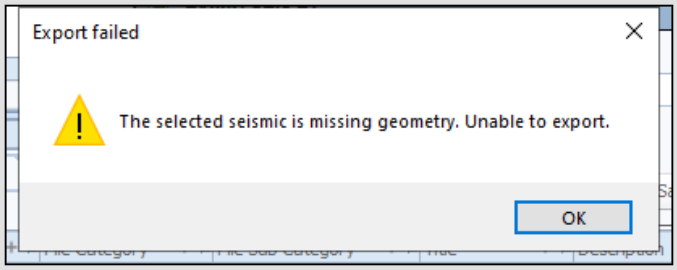
The **Export Seg-P1** window opens.

3. From the drop-down, select **Output Template**.
4. Click the folder icon and browse to the save location.



5. Enter a file name, then click **Save**. The file path will display in the **Export Seg-P1** window.
6. Click **Save**.

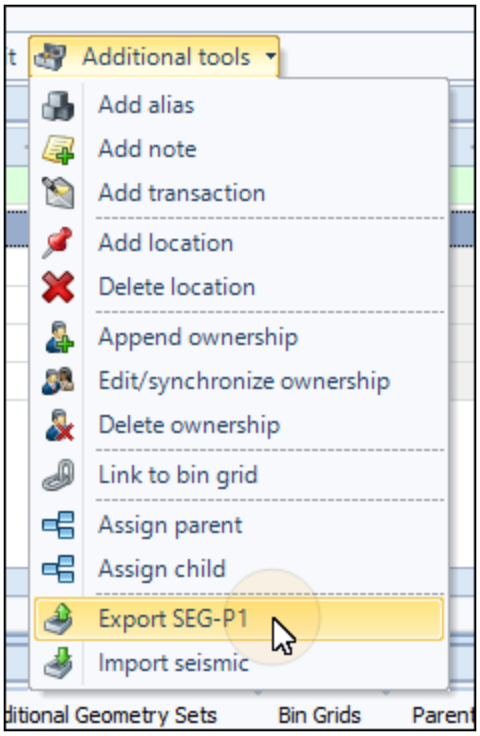
   The Seg-P1 files populate and save to the specified location.

> **Warning:**
> If the selected records don't have geometry associated with them you may get the following error:
>
> 
>
>
> Click **OK** to clear the dialog, then click **Cancel** to exit the process

The **Export Seg-P1** tool exports a SegP1 file based on the geometry of the seismic selected for export. The **Export SegP1** tool exports one file per coordinate reference system (CRS) with headers separating each seismic item.

To export seismic record to a Seg-P1 file:

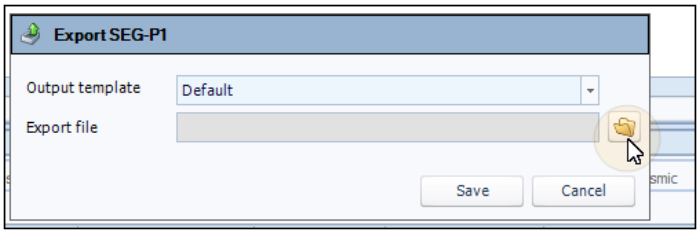
1. Select the target records in the **Seismic** grid.
2. Click **Additional Tools** and select **Export Seg-P1**.



Tip:
Alternatively, you could right-click and select **Additional Tools>SEG-P1** from the context menu.

The **Export Seg-P1** window opens.

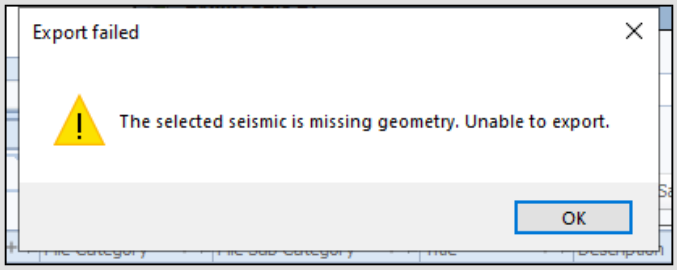
3. From the drop-down, select **Output Template**.
4. Click the folder icon and browse to the save location.



5. Enter a file name, then click **Save**. The file path will display in the **Export Seg-P1** window.
6. Click **Save**.

   The Seg-P1 files populate and save to the specified location.

Warning:
If the selected records don't have geometry associated with them you may get the following error:



Click **OK** to clear the dialog, then click **Cancel** to exit the process

3.2 Well

The Wells Module for Exploration Archives is intended to give you the ability to manage your well data in a similar fashion to your seismic line data. Users with security permission can add new wells to the database and manage the links between wells, navigation, and the associated files and media.

The majority of the functionality is the same as the Seismic module, except for a few instances.

New in this version:

- New Import Geometry Tool.
- Well maps have had some improvements.

The Wells Module for Exploration Archives is intended to give you the ability to manage your well data in a similar fashion to your seismic line data. Users with security permission can add new wells to the database and manage the links between wells, navigation, and the associated files and media.

The majority of the functionality is the same as the seismic module, except for a few instances.

Search Wells

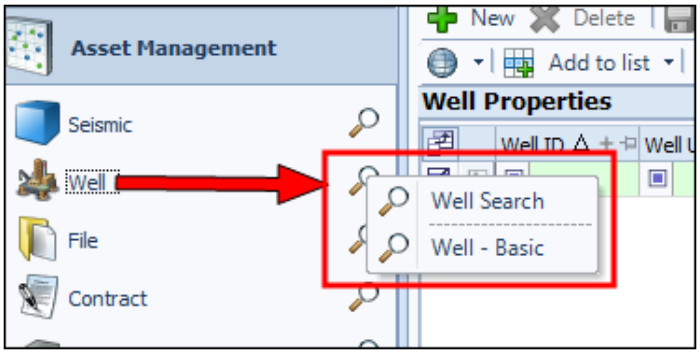
The reasons for searching wells are:

- To view information.
- Edit information.
- Add items from the grid to a **Data Request**.

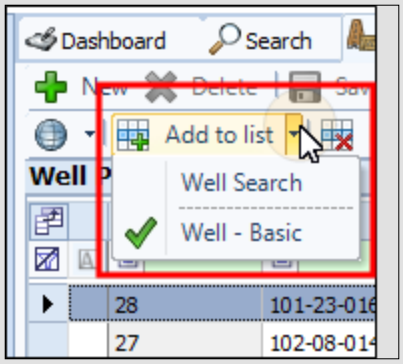
For a basic view of wells, click the **Search** module tab and use the **Select a new search** option. The results display within the **Search** tab. For more details, refer to "Use custom searches" on page 24.

To manipulate data or collect more detailed information, use the module search next to **Well** in the navigation panel. This option opens the results within the **Well** module.

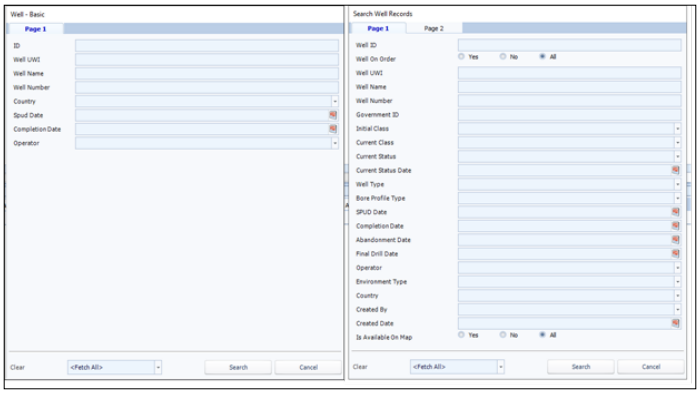
1. Click the Search icon next to Well in the Navigation panel. You'll see a sub-menu listing all the search options.



Tip:
Alternatively, you can select a search from the **Add to list** drop-down on the toolbar.



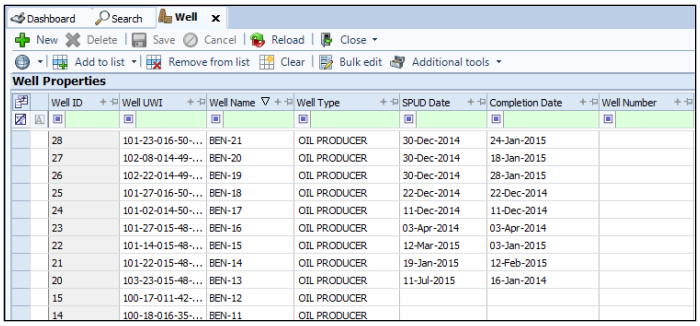
2. Select the appropriate search you need and a search window opens.



Note:
The search fields will vary depending on the search profile.

3. Enter your filter values and click **Search**.

   The results open in the **Well** module. Scroll through the grid to view record detail and associated information.

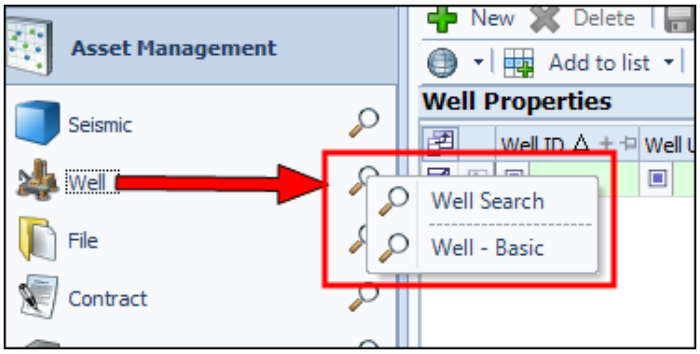


The reasons for searching wells are: to view information, edit information or add items from the grid to a **Data Request**.

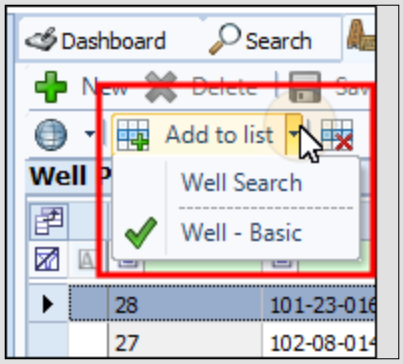
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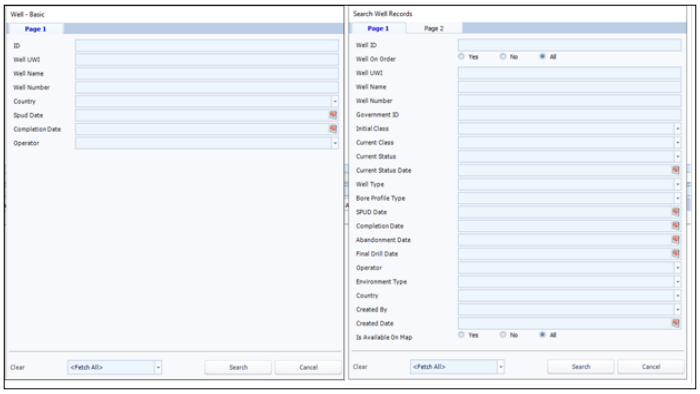
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Tip:
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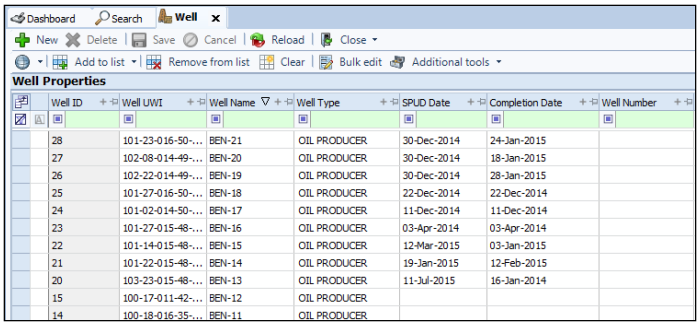
2. Select the appropriate search you need and a search window opens.



Note:
The search fields will vary depending on the search profile.

3. Enter your filter values and click **Search**.

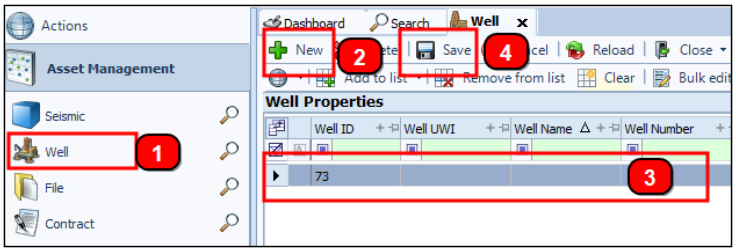
   The results open in the **Well** module. Scroll through the grid to view record detail and associated information.



Export: The **Export** function exports grid information to various document types, including Excel®.

Manually add a Well

To manually add new seismic to Exploration Archives:



1. Click **Seismic** in the Navigation panel to open the module.
2. Click **New** . A new empty row displays in the grid.

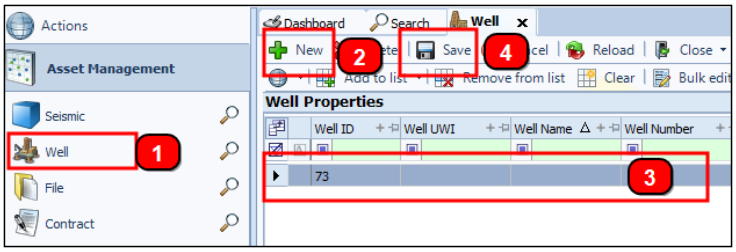
   Note:
   The system will auto-generate a **Well ID**.

3. On the empty row, fill in the cells under the respective columns. The columns for some items like **Initial Class**, **Current Class**, and **Well Type** are pre-configured and are populated with a drop-down list. Other fields you can can click inside the cell and manually enter data.

> **Tip:**
> Use the Column chooser to hide or add other columns to the grid.

4. Click **Save**.

To manually add new seismic to Exploration Archives:



1. Click **Seismic** in the Navigation panel to open the module.
2. Click **New** and a new row displays in the grid.

> **Note:**
> The system will auto-generate a **Well ID**.

3. On the empty row, fill in the cells under the respective columns. The columns for some items like **Initial Class**, **Current Class**, and **Well Type** are pre-configured and are populated with a drop-down list. Other fields you can can click inside the cell and manually enter data.

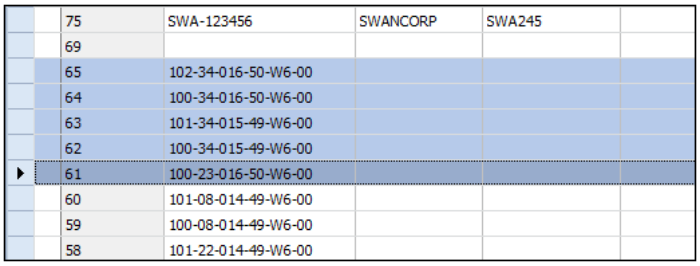
> **Tip:**
> Use the Column chooser to hide or add other columns to the grid.

4. Click **Save**.

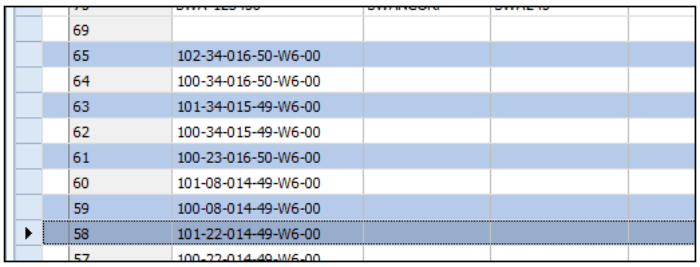
Assign a Header Well

You can set parent/child relationships for wells by assigning a header well:

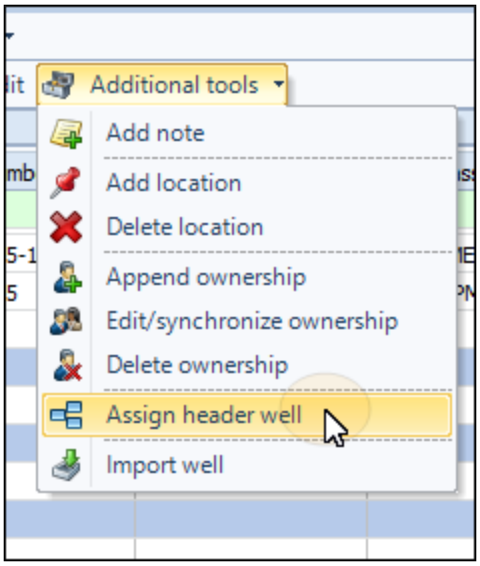
1. In the **Well Properties** grid select two or more wells by shift-clicking consecutive rows



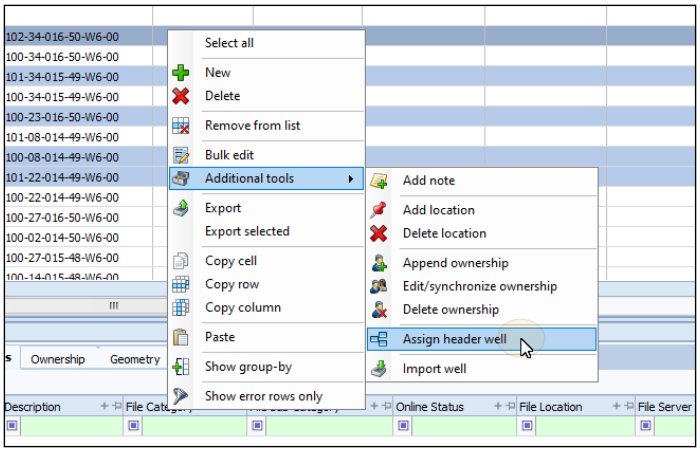
You select non-consecutive wells in the grid by holding the **ctrl** key then selecting the wells.



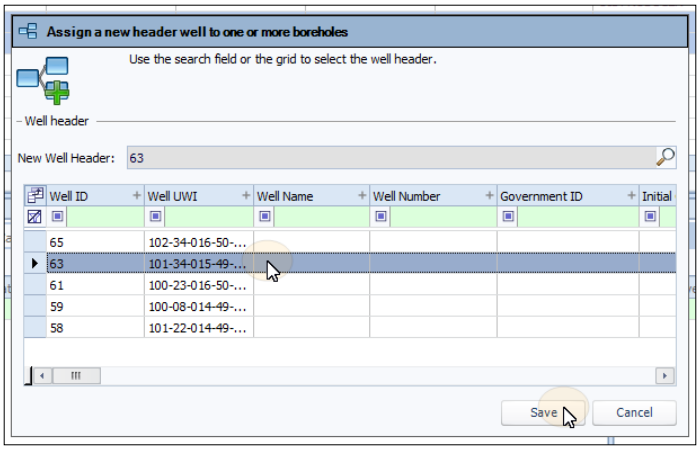
2. From the toolbar, select **Additional Tools > Assign Header Well**.



You can also right-click on the wells grid and select **Additional tools > Assign Header Well** from the context menu.



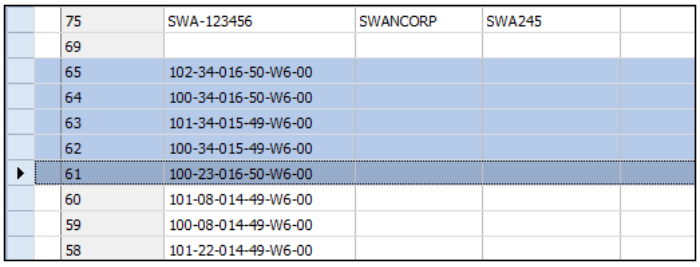
3. From the window that appears, assign the header well for the bore holes from the list on the grid, then click **Save**.



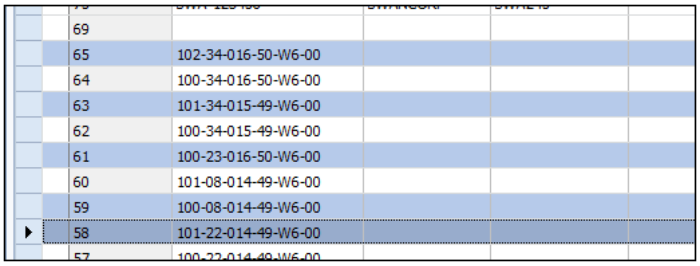
The parent/child relationship will be made and the chile wells will appear in the **Bores** tab of the parent well

You can set parent/child relationships for wells by assigning a header well:

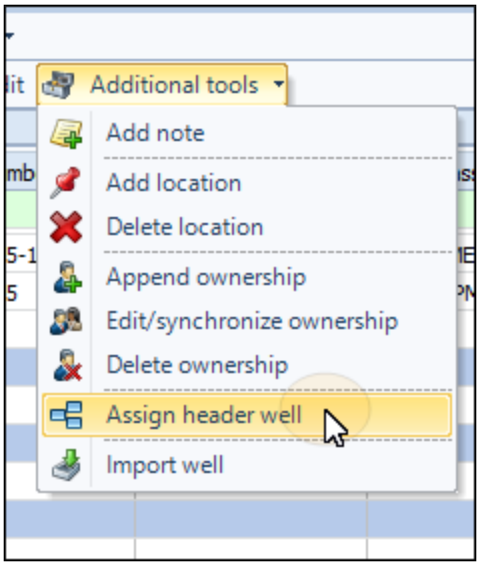
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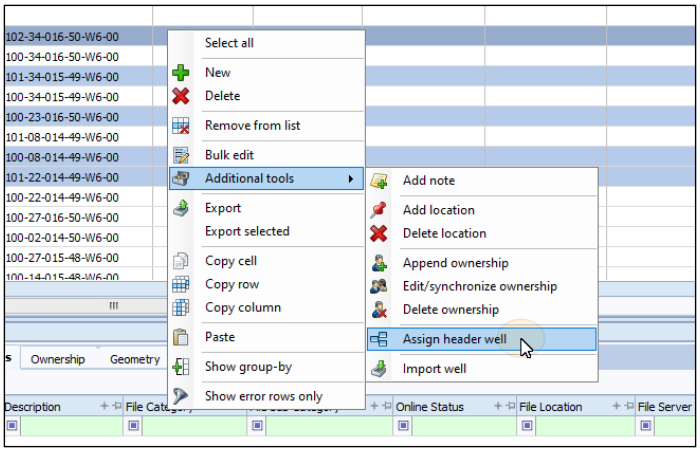
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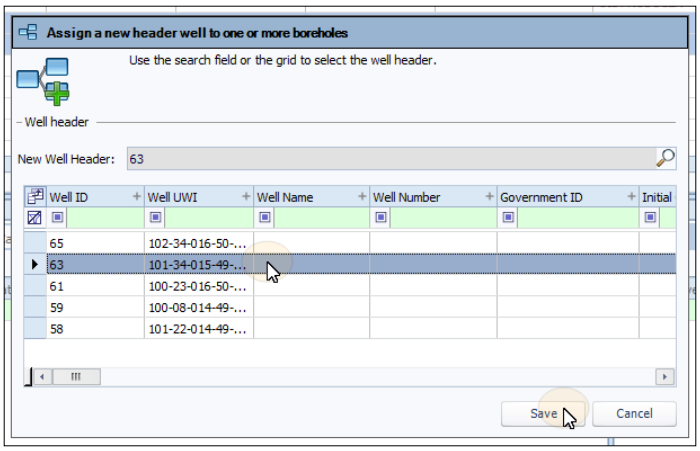
2. From the toolbar, select **Additional Tools > Assign Header Well**.



You can also right-click on the wells grid and select **Additional tools > Assign Header Well** from the context menu.



3. From the window that appears, assign the header well for the bore holes from the list on the grid, then click **Save**.

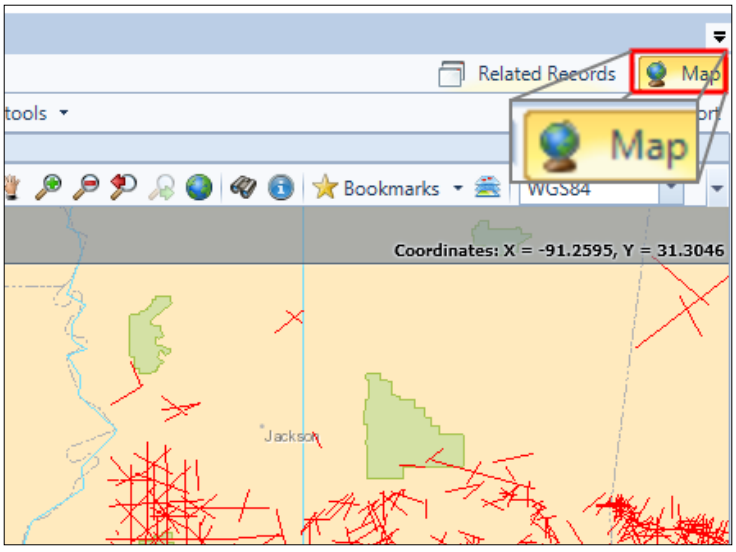


The parent/child relationship will be made and the chile wells will appear in the **Bores** tab of the parent well

Use the map

The **Well**module can display your records on a map. You can search the map to locate Wells and add to your Well grid.

To open (or close) the map view, click **Map** in the menu bar.

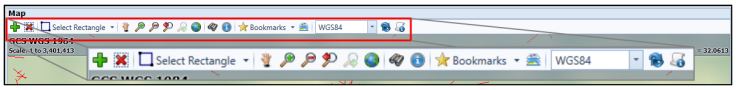


To adjust the size of the viewing panel, click and drag the bar that divides the map view and the **Well Properties** grid.

To view the **Map** panel in a separate window, or move to an alternate monitor, click and hold in the header of the panel and drag to float.

Use the map toolbar

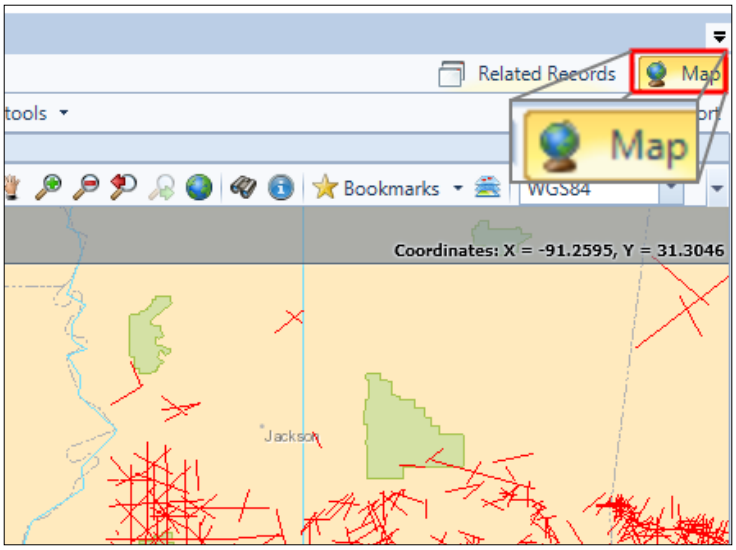
The **Map** includes a variety of navigational and selection tools for searching and viewing your data.



To activate a tool, click the item in the toolbar.

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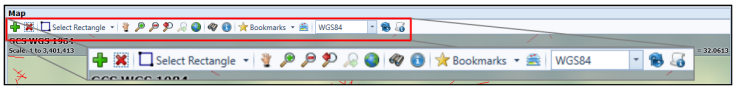


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Using the map toolbar

The **Map** includes a variety of navigational and selection tools for searching and viewing your data.



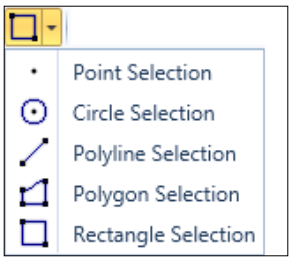
To activate a tool, click the item in the toolbar.



Add: Use the **Select** tool to select seismic on the map. Click **Add** and the seismic adds to the **Seismic** grid.



Deselct: Deselect all features that are currently selected on the map.



Select: Click to open the selection options. Using the selection tool, click on, or draw around, items on the map to select.



Pan: Click and drag to pan the map. Double-click to zoom in slightly.



Zoom in: Draw an area on the map to zoom the view to the specified extent.



Zoom out: Draw an area to quickly zoom out.



Previous extent: Click to go back to the previous extent.



Next extent: After clicking to load to a previous extent, click **Next extent** to go forward again.



Full map: Click to expand the view to the full extent of the map.



Search: Click to open a Search window. For more information see "Search the map " on page 50.



Identify: Identify the features of particular items on the map.

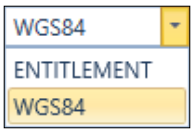
Click to activate the **Identify** cursor  . For more information see "Identifying features " on page 51.



Bookmarks: Create or select a bookmark for quick navigation to map locations.



Layers: Click to open the layers legend. In the layers legend, select and deselect to display different map layers. The map layers you select save to your profile for the next time you open the **Map**.



CRS: Specifies the coordinate reference system (CRS) for the map. If more than one CRS is configured, a drop-down menu is available with other options.



Refresh: Click to refresh all map layers and data sources.



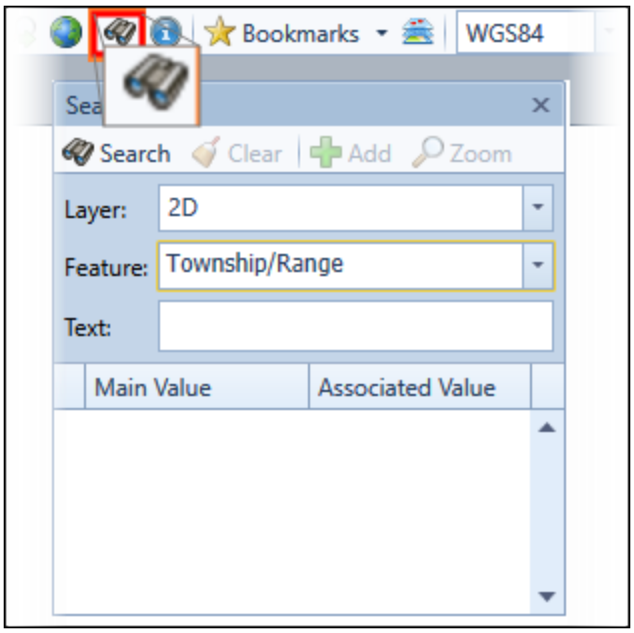
Log: Click to open a log of your actions. This log is useful for troubleshooting map issues.

Search the map

The search function is a quick method for locating records on the map.

To search for records:

1. Click **Search** to open the **Search** window.



2. In the **Search** window, select a layer and feature.
3. Enter text to filter your search.

> **Note:**
> The search fields do not support Wildcard characters (* or %).

4. Click **Search** and the results populate in the grid.
5. To navigate to the map location of the well, select the seismic and click **Zoom To**.

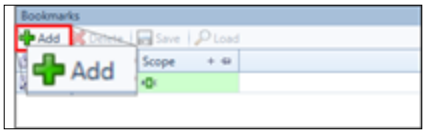
Create map bookmarks

Bookmarks provide quick navigation to specified map locations.

To create a new bookmark:

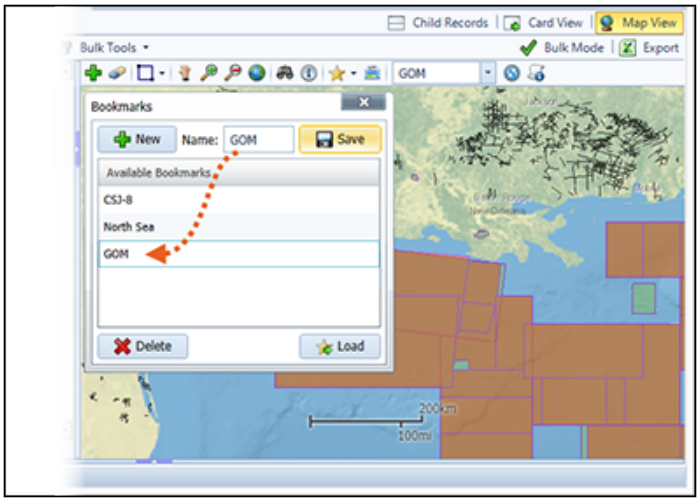
1. Navigate to the target location on the map.
2. Click Bookmarks to open the **Bookmarks** window.

3. Click **Add**.



4. Enter a name for your bookmark then click **Save**.

   The bookmark will add to the list of bookmarks and will be available from the bookmark drop-down.

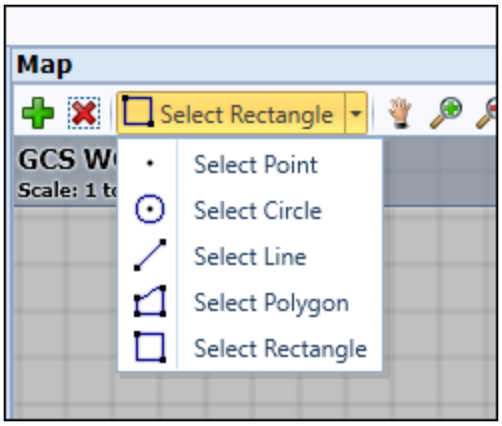


5. To navigate to a bookmarked location, select the bookmark from the **Bookmarks** drop-down menu.

Select Wells on the map

Use the selection tools available in the local menu bar for selecting features on the map. After selecting the features, click the **Add** button to add them to the **Well Properties** grid and view their details.

Click the drop-down and change your cursor to a selection tool to select features on the map.



The Selection Tools available include:

- **Select Point**: Use to select points.
- **Select Circle**: Draws a circle or an ellipse, depending on how the mouse cursor is dragged after the initial click.

> **Note:** The shape being drawn is not filled , it only displays the border.

- **Select Polyline**:Each placed vertex contains a sequential number representing the vertex index. The drawing is completed when an existent vertex is clicked, instead of requiring a double click.

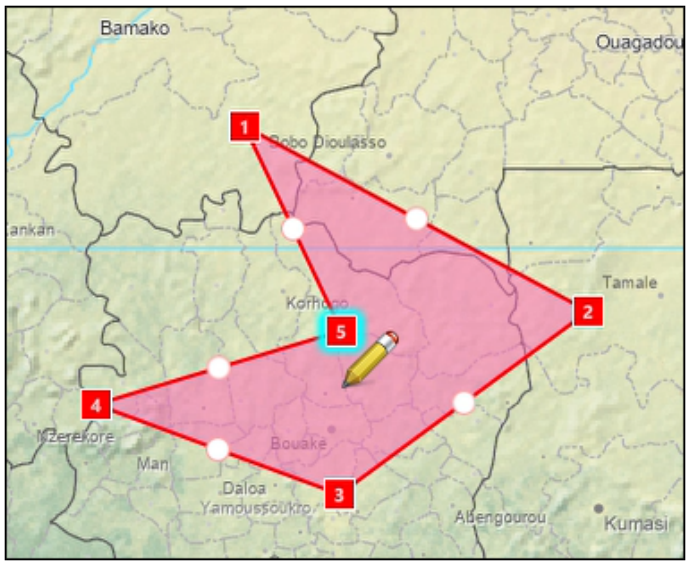


.

- **Select Rectangle**: The rectangle is now transparent, displaying only the borders, similar to the **Select Circle** tool:



- **Select Polygon**: After placing the polygon vertices, you can complete it by clicking again on an already placed vertex:

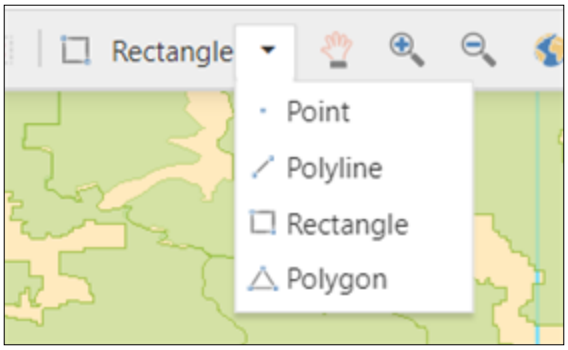


Add: To add seismic to the grid, select the target items on the map and click the **Add** button. Selected lines become highlighted. When added to the grid, the highlighting changes colour.

Clear Selected: Click the **Clear Selected** button to deselect items from the map.

Use the selection tools available in the local menu bar for selecting features on the map. After selecting the features, click the **Add** button to add them to the **Well Properties** grid and view their details.

Click the drop-down and change your cursor to a selection tool to select features on the map.



The Selection Tools available include:

- **Point**: Use to select points.
- **Polyline**: Use to select seismic within specified points. On the map, click the starting point of your target area. Click each point until your selected area is complete.

- **Rectangle**: Click and drag to draw a rectangle around the target lines.
- **Polygon**: Click and drag to draw a polygon around the target lines.



Add: To add seismic to the grid, select the target items on the map and click the **Add** button. Selected lines become highlighted. When added to the grid, the highlighting changes colour.



Clear Selected: Click the **Clear Selected** button to deselect items from the map.

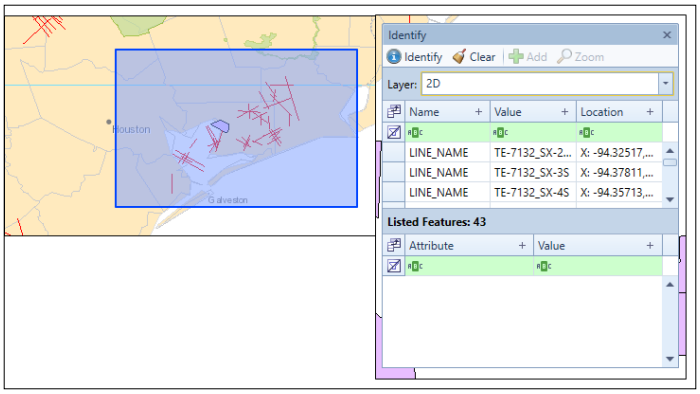
Identifying features

The **Identify** function provides a quick view of Well features and quick navigation to the map location.

Identify: Populates a list of features associated to an item.

To Identify features:

1. Locate the Well data on the map and zoom to the area.
2. Click **Identify** to turn on the identify selection cursor .
3. Click and drag to draw an area around items on the map.
   The results open in the **Identify** window.

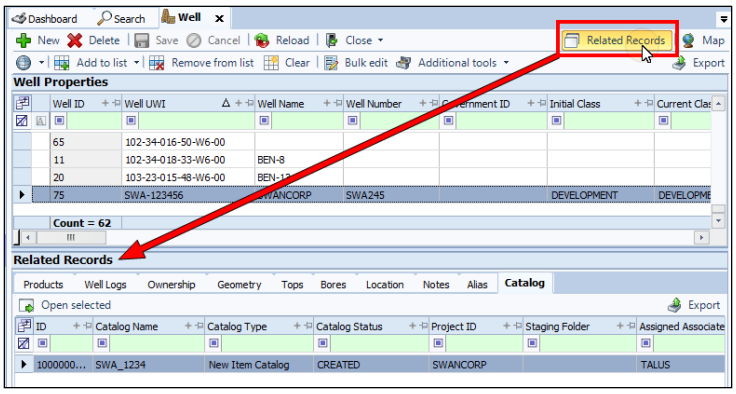


4. Click on an item in the upper grid to display the associated features in the lower grid.
5. Click **Zoom To** to zoom the map view to the item location.
6. To add items from the **Identify** window directly to the **Well Properties**grid, select the item and click **Add To List**. To select multiple items, hold Ctrl or Shift and click.

View Related Records

The **Well** module includes a **Related Records** panel for viewing and accessing additional information.

To open the **Related Records** panel, click **Related Records** in the menu.



The **Related Records** panel opens in the lower portion of the **Wells** module. The associated information displays according to the seismic item that is selected as active in the grid.

A row that is "active" in a grid displays an arrow in the leading column.

The **Related Records** include tabs dedicated to particular categories of metadata. Browse the areas in the tabs to view the related information.

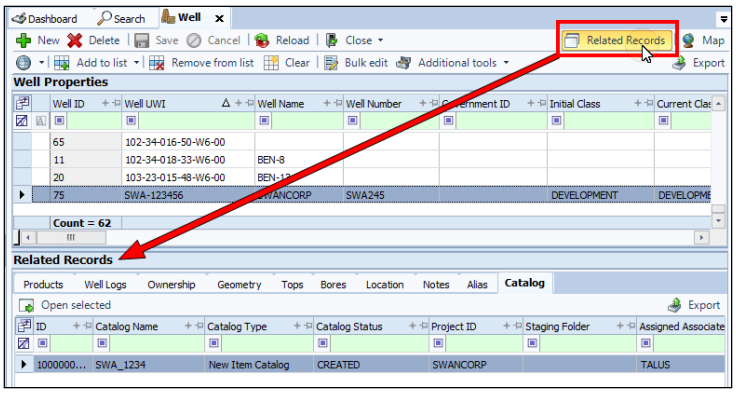
To open an item displayed in **Related Records**, click to select and click **Open selected** (if available).

The tabs in **Related Records** for the **Well** module include:

- Products
- Well Logs
- Ownership
- Geometry
- Tops
- Bores
- Location
- Notes
- Alias
- Catalog

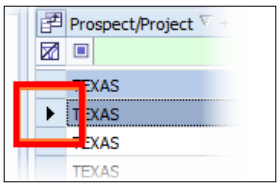
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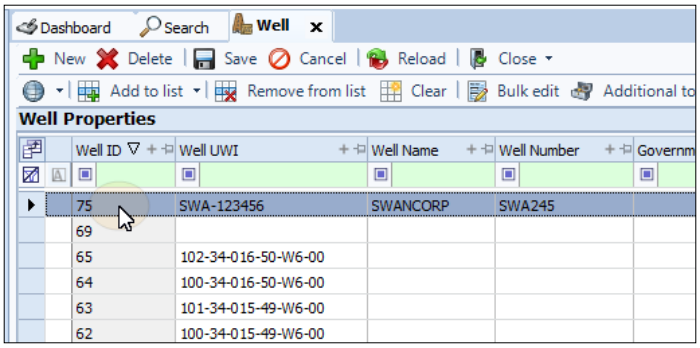
- Products
- Well Logs
- Ownership
- Geometry
- Tops
- Bores
- Location
- Notes
- Alias
- Catalog

Owners

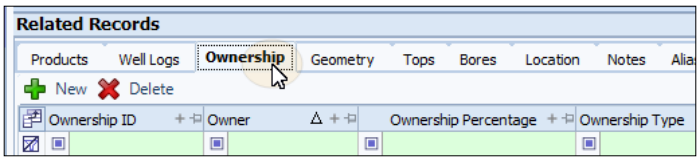
You can assign the owners and their ownership stake to a well on the Well Properties Grid.

To assign owners to a well:

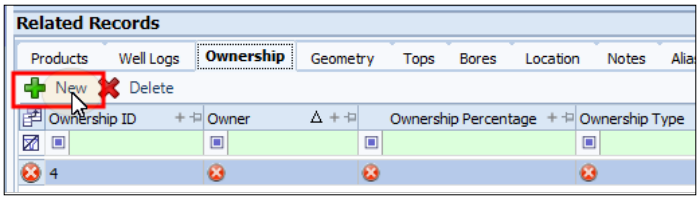
1. In the **Well Properties** panel select a well on the grid.



2. On the **Related Records** panel, select the **Ownership** tab to make it active.

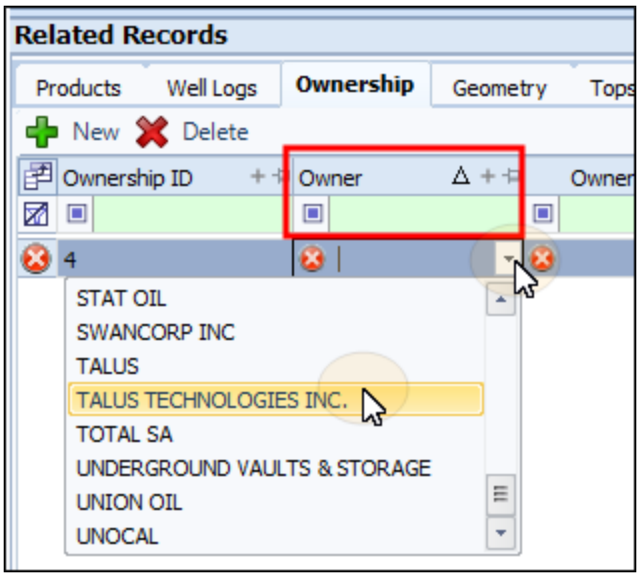


3. From the toolbar, click **New**. A blank row will appear in the grid.

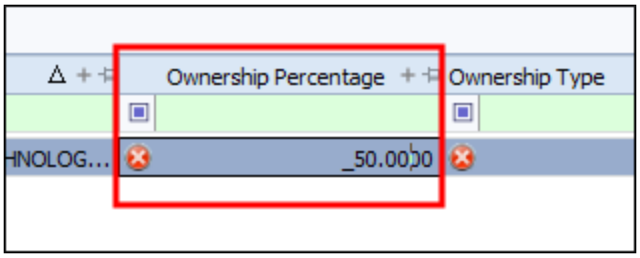


> **Note:**
> An **Ownership ID** will be assigned to the row automatically. The circular X in each cell indicates a required information. When the fields have been filled and verified the indicator will disappear.

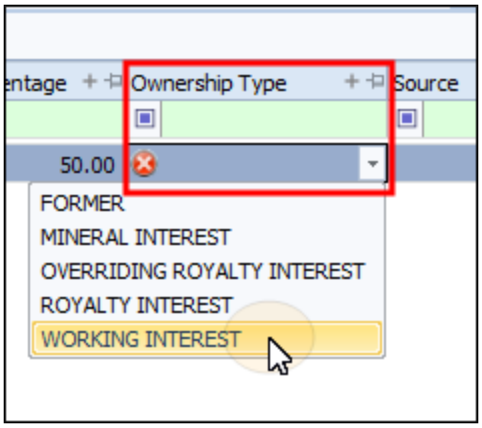
4. In the **Owner** column, select the owner from the drop-down list.



5. Enter the **Ownership Percentage**.



6. Select the **Ownership Type** from the drop-down list.

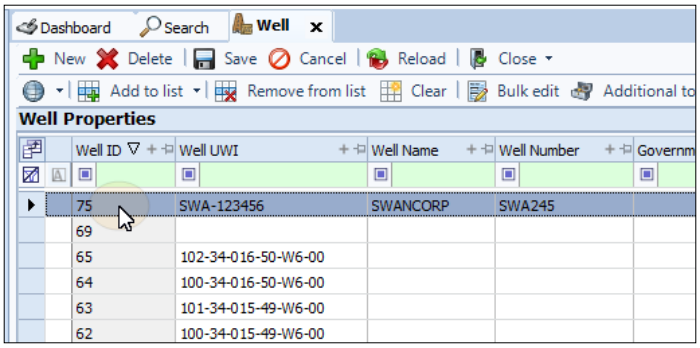


7. Fill out the **Source** and enter any **Remarks** by double-clicking in the respective cells and typing the data into them.
8. On the Toolbar, select **Save**.

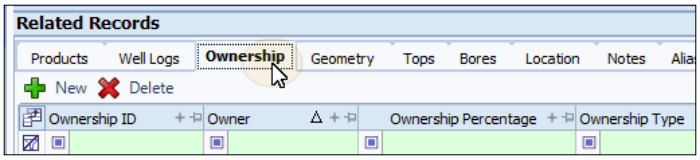
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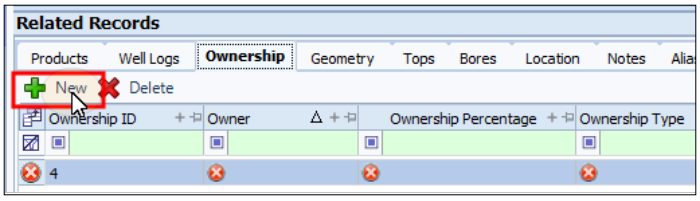
1. In the **Well Properties** panel select a well on the grid.



2. On the **Related Records** panel, select the **Ownership** tab to make it active.

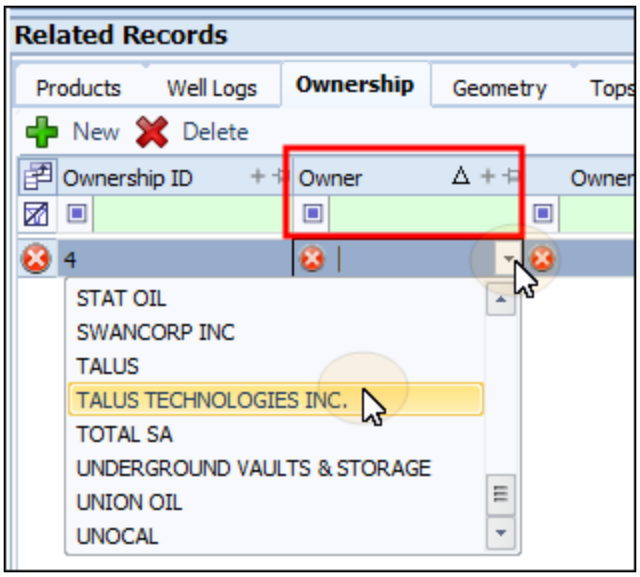


3. From the toolbar, click New. A blank row will appear in the grid.

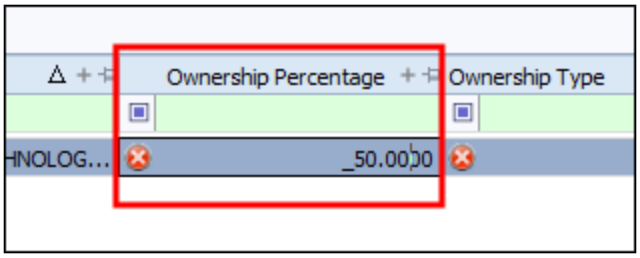


> **Note:**
> An **Ownership ID** will be assigned to the row automatically. The circular X in each cell indicates a required information. When the fields have been filled and verified the indicator will disappear.

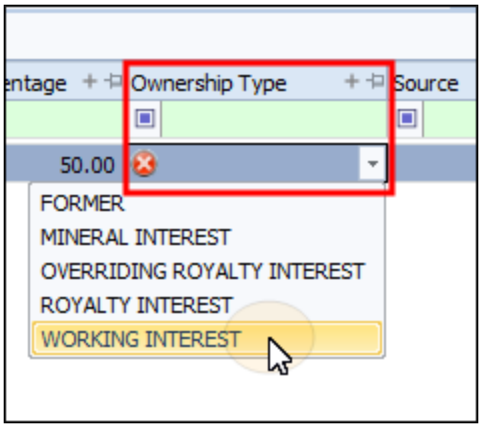
4. In the **Owner** column, select the owner from the drop-down list.



5. Enter the **Ownership Percentage**.



6. Select the **Ownership Type** from the drop-down list.



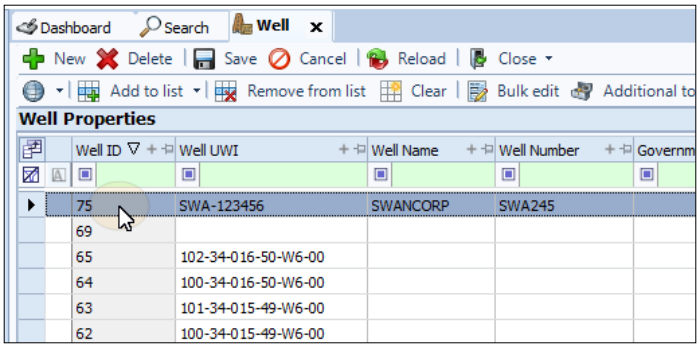
7. Fill out the **Source** and enter any **Remarks** by double-clicking in the respective cells and typing the data into them.
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Geometry

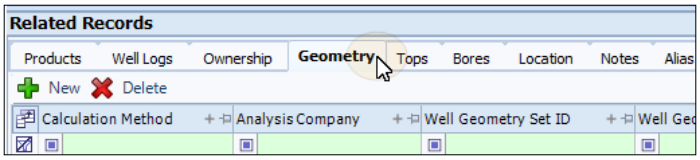
You can add Geometry sets and include data for a well.

To add a Geometry set to a well:

1. In the **Well Properties** panel select a well on the grid.

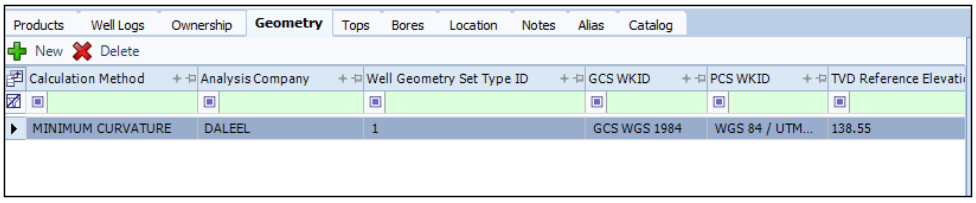


2. On the **Related Records** panel, select the **Geometry** tab to make it active.

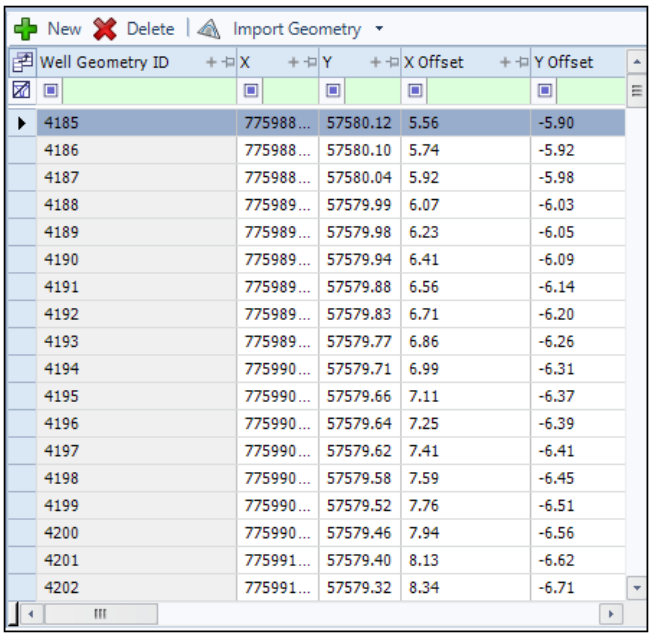


The tab is divided into 3 parts:

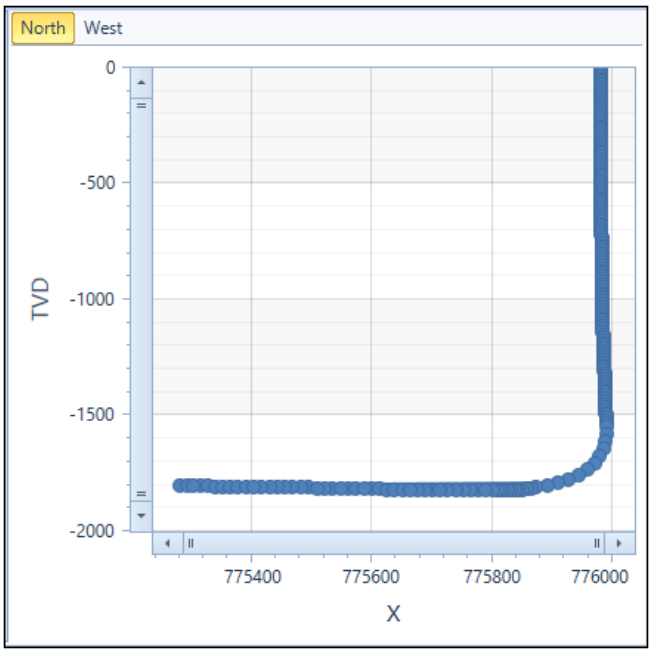
- Information about the Geometry set.



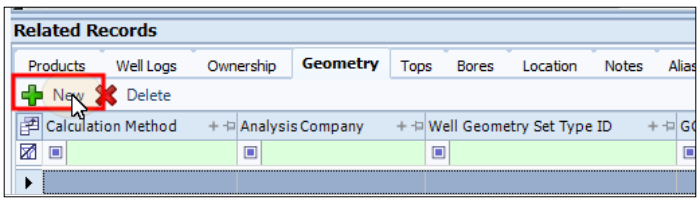
- Where the points are added.



» A graph with the Geometry plotted.

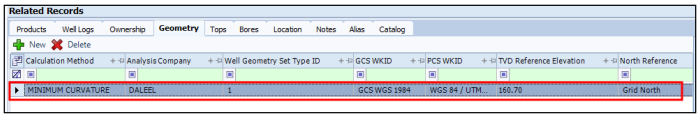


3. From the toolbar, click **New**. A blank row will appear in the grid.

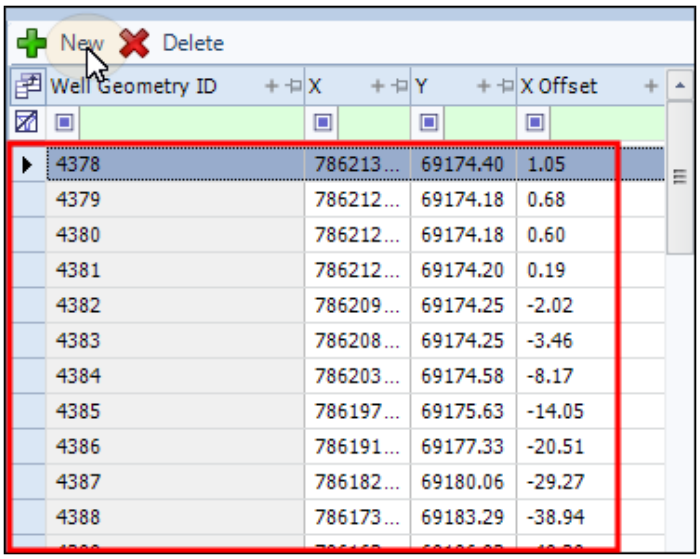


> **Note:**
> An **Well Geometry Set ID** will be assigned to the row automatically. Once the Geometry set has been added, note that the New button in the Geometry data panel becomes active.

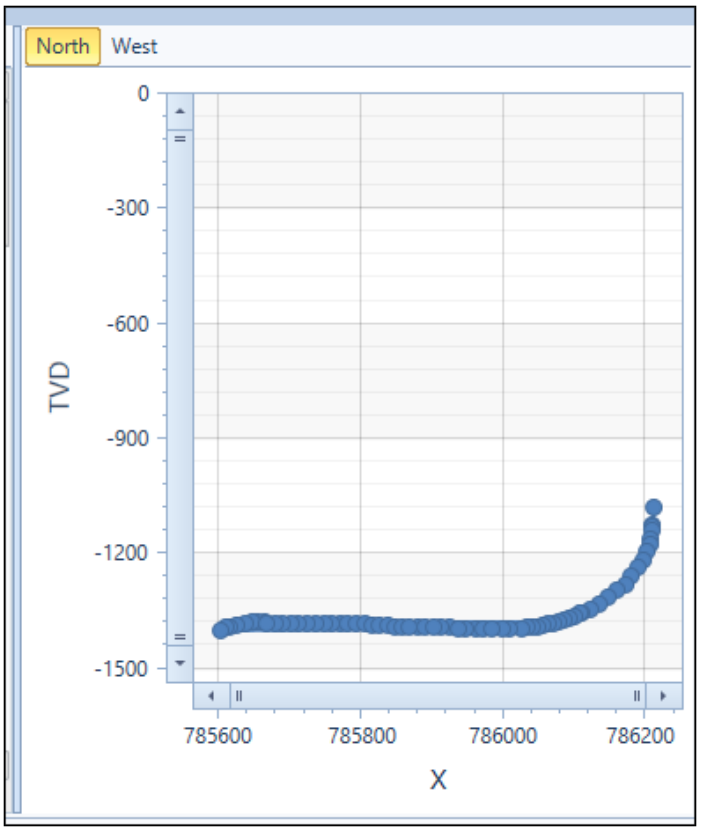
4. Enter all the relevant information in the columns for the row.



5. In the second panel click **New** and enter the relative information (**X, Y, X Offset, Y Offset, Measured Depth**). Repeat to add additional points.



6. As you add Geometry, the graph in the third panel will start to display the data.

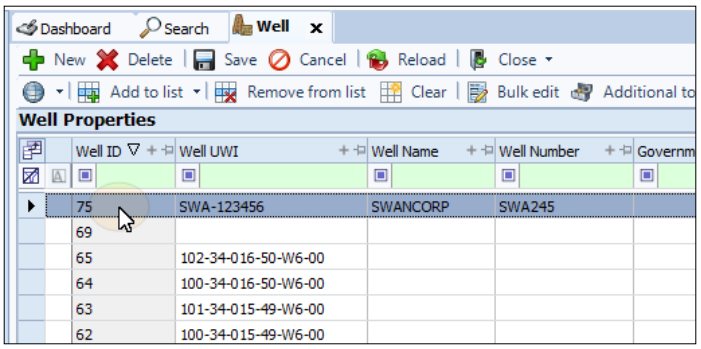


7. On the Toolbar, select **Save**.

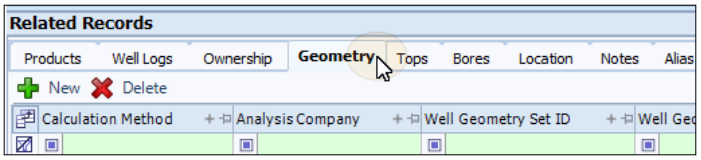
You can add Geometry sets and include data for a well.

To add a Geometry set to a well:

1. In the **Well Properties** panel select a well on the grid.

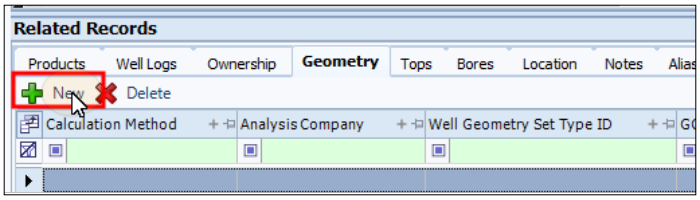


2. On the **Related Records** panel, select the **Geometry** tab to make it active.



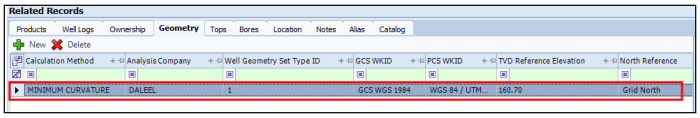
The tab is divided into 3 parts: Information about the Geometry set, the second is where the points are added, and the third is a graph with the Geometry plotted.

3. From the toolbar, click New. A blank row will appear in the grid.

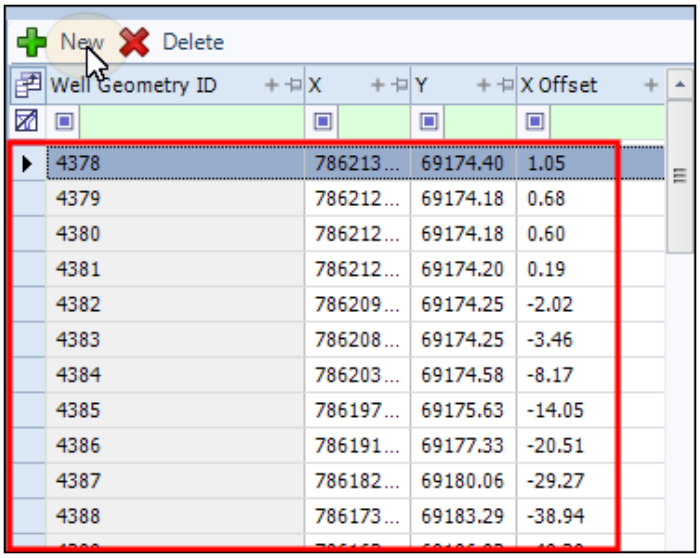


Note:
An **Well Geometry Set ID** will be assigned to the row automatically. Once the Geometry set has been added, note that the New button in the Geometry data panel becomes active.

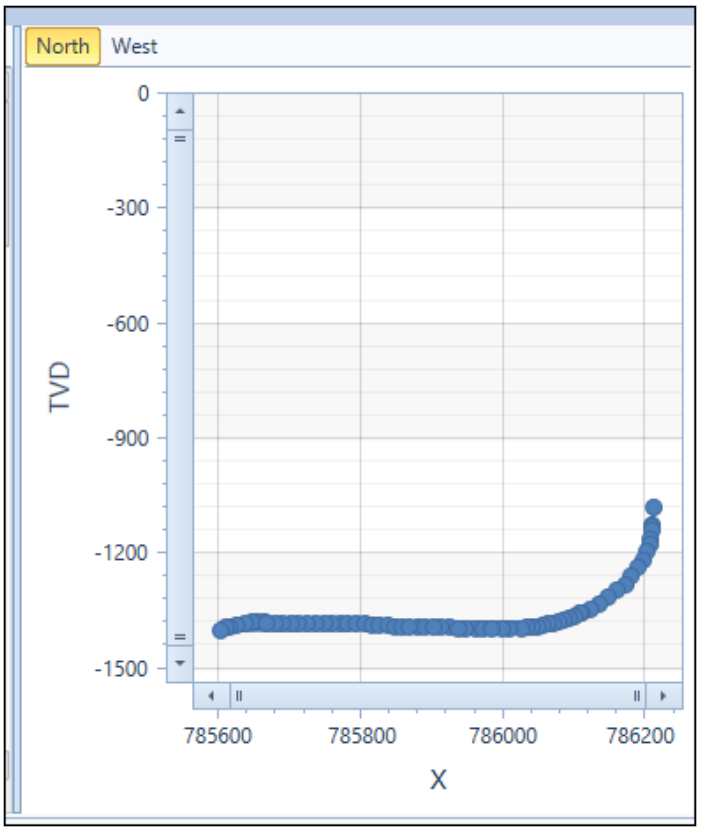
4. Enter all the relevant information in the columns for the row.



5. In the second panel click **New** and enter the relative information (**X, Y, X Offset, Y Offset, Measured Depth**). Repeat to add additional points.



6. As you add Geometry, the graph in the third panel will start to display the data.



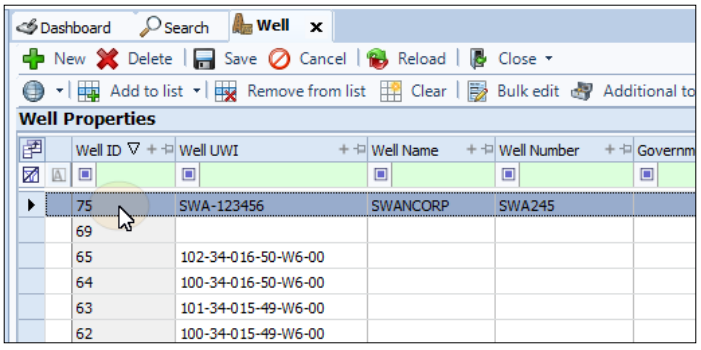
7. On the Toolbar, select **Save**.

Tops

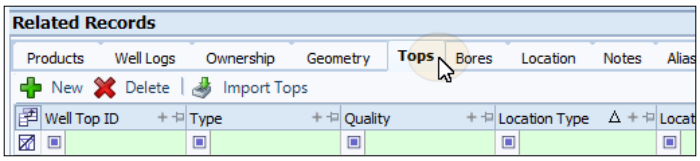
Tops data for a well can be added in one of 2 ways. Manual entry or import from an excel spreadsheet.

To manually add Tops to a well:

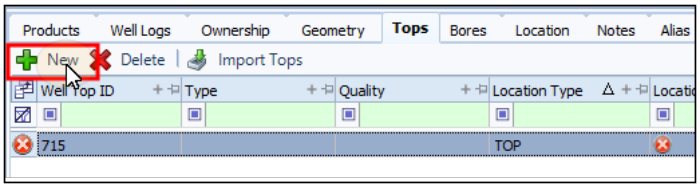
1. In the **Well Properties** panel select a well.



2. On the **Related Records** panel, select the **Tops** tab to make it active.

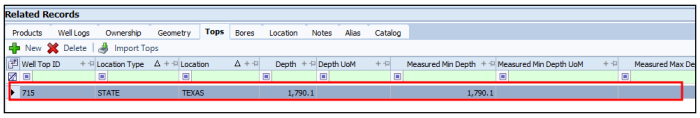


3. From the toolbar, click New. A blank row will appear in the grid.



> **Note:**
> An **Well Top ID** will be assigned to the row automatically. The circular X in each cell indicates a required information. When the fields have been filled and verified the indicator will disappear.

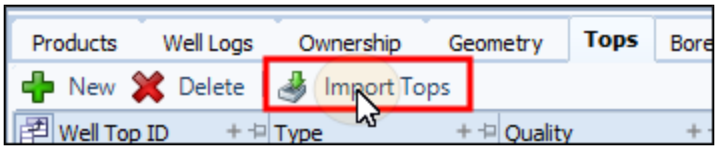
4. Enter all the relevant information in the columns for the row.



5. On the Toolbar, select **Save**.

Import Tops from an Excel spreadsheet

1. In the toolbar in the Tops tab, select **Import Tops**.



2. Navigate to where the Excel workbook is stored. Highlight the file.
3. Click **Open**.
4. After a short period the data will populate the grid.
5. Click **Save**.

> **Note:**
> The header columns in the Excel spreadsheet should match the headers on the grid. You can make an Excel template or sorts by manually adding a row to the grid, then exporting the grid. Use that file as a template for your data. Make sure delete the Well Top ID from the spreadsheet, as it's generated automatically.

Bores

Select Version of EA Desktop:

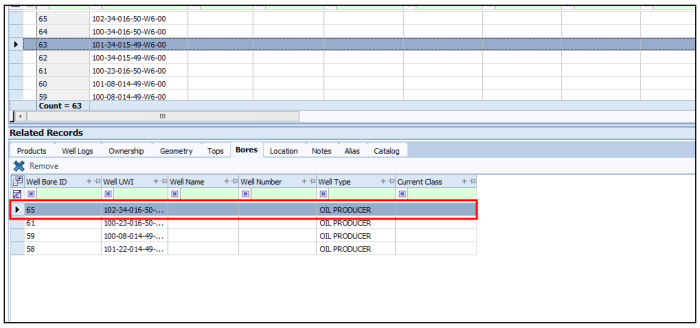
The Bores tab shows all the bore holes that are attached to a specific well.

The bores on this tab are generated after following the steps for assigning a header well.

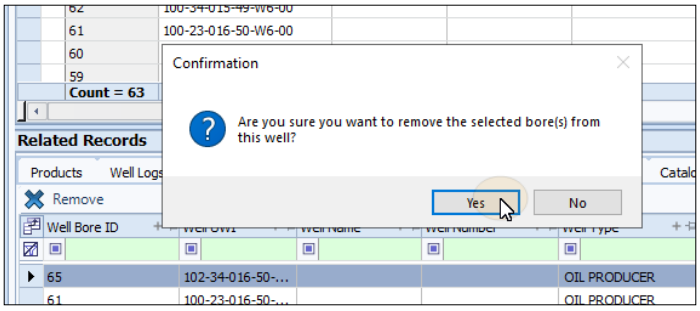
You can remove a bore from a well from this tab, you can't add one.

To remove a bore from the list:

1. Select the bore hole from the grid in the Bores tab.



2. Click Remove. A confirmation disalog box will appear.



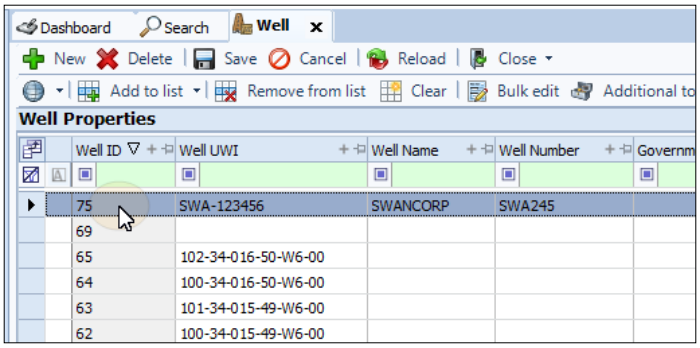
3. Click **Yes**. The well be removed for the list, and the child relationship will be broken with the header well.

Locations

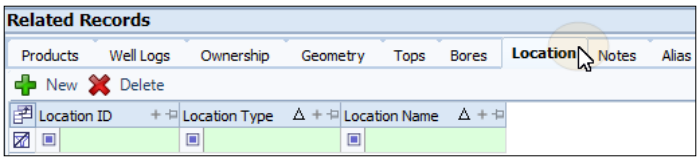
You can add Location information for a well.

To add a Location to a well:

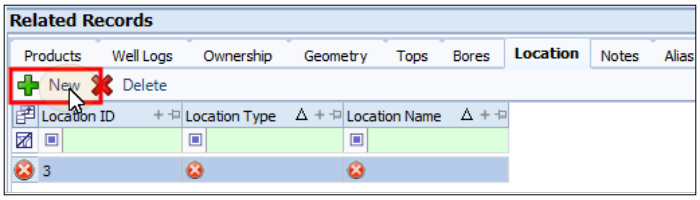
1. In the **Well Properties** panel select a well.



2. On the **Related Records** panel, select the **Location** tab to make it active.

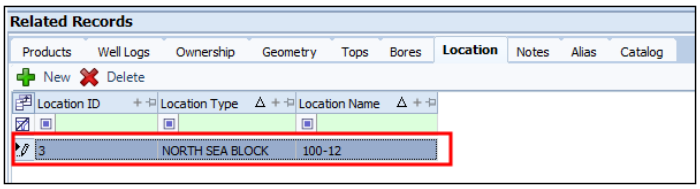


3. From the toolbar, click New. A blank row will appear in the grid.



> **Note:**
> A **Location ID** will be assigned to the row automatically. The circular X in each cell indicates a required information. When the fields have been filled and verified the indicator will disappear.

4. Enter all the relevant information in the columns for the row.



> **Note:**
> Some fields are configured by selecting values in a drop-down list. The columns shown may be turned off in the grid. Use the Column Chooser to turn columns on or off.

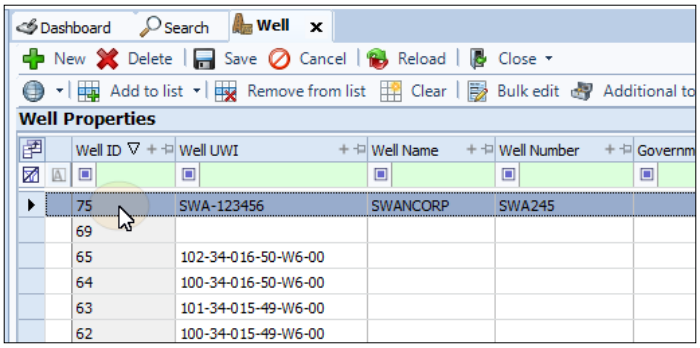
5. On the Toolbar, select **Save**.

Notes

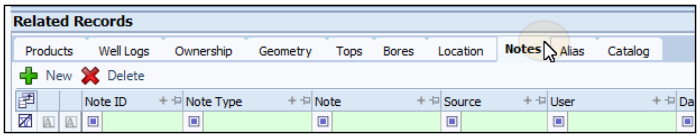
You can add notes or attach a file to a well record.

To add a Note:

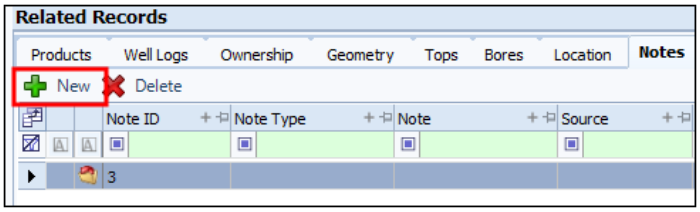
1. In the **Well Properties** panel select a well.



2. On the **Related Records** panel, select the **Notes** tab to make it active.

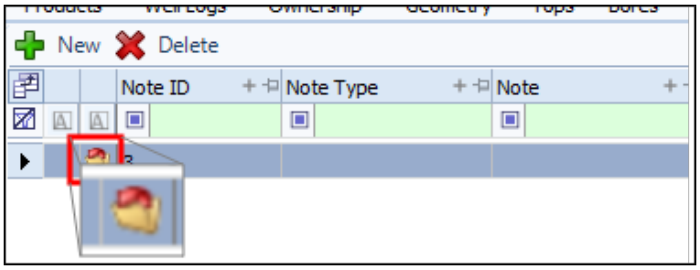


3. From the toolbar, click New. A blank row will appear in the grid.

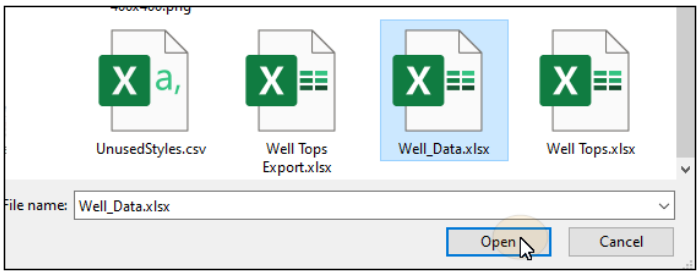


> **Note:**
> A **Note ID** will be assigned to the row automatically.

4. You can attach a file as a note. To do this, click the **Browse** button at the head of the row. An open dialog window will appear.

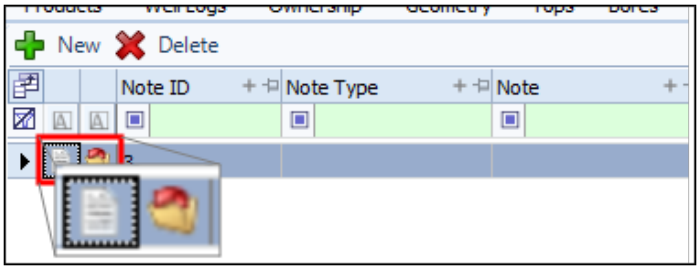


5. Navigate to where the file is stored on your device. Select the file then click **Open**.

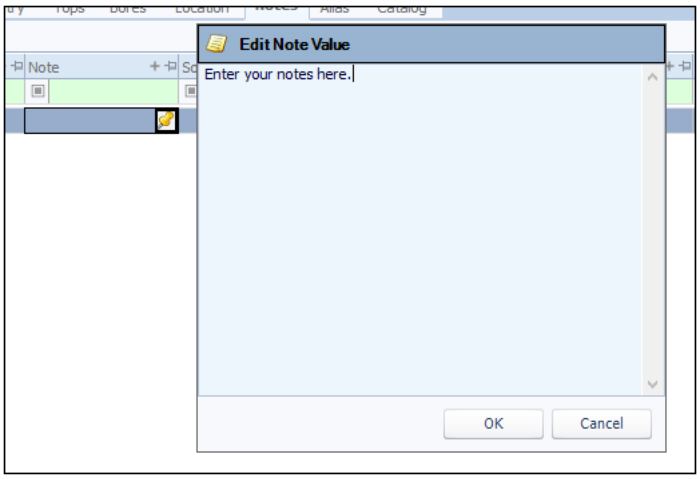


The file will be attached. The **File Name** and **Path** columns will be filled out.

6. A **View** button will appear next to the **Browse** button. You can click this button and the attached file will open.



7. Select the **Note Type** from the drop-down list.
8. Hover over the **Note** field. A pin icon appears. Click the icon and the **Edit Note Value** window opens.



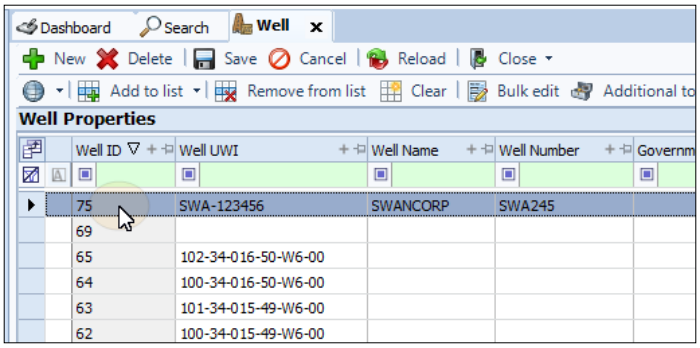
9. When you finish entering your notes, click **OK**. The field will show the first few characters of the note.
10. When finished, click **Save**.

Alias

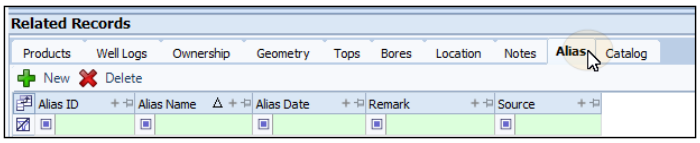
You can add an alias to well record.

To add an Alias:

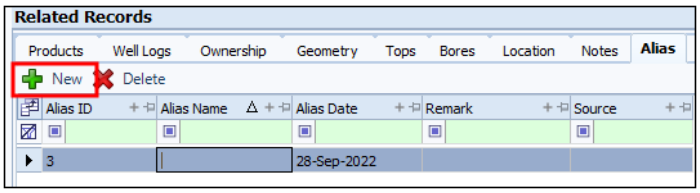
1. In the **Well Properties** panel select a well.



2. On the **Related Records** panel, select the **Alias** tab to make it active.

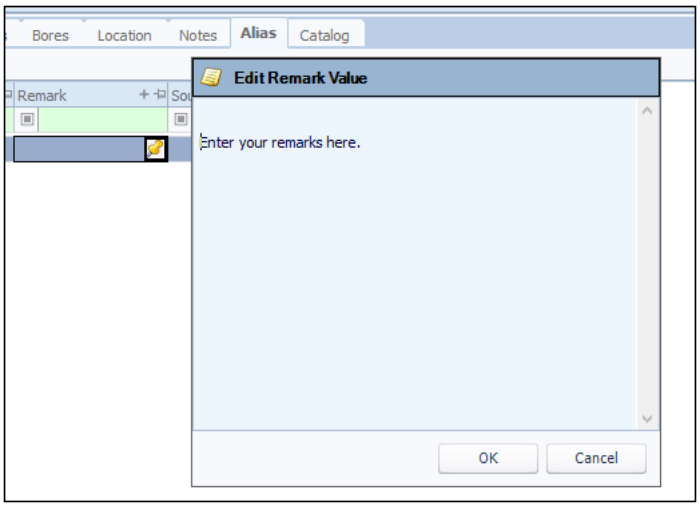


3. From the toolbar, click New. A blank row will appear in the grid.



> **Note:**
> An **Alias ID** will be assigned to the row automatically.

4. Double-click in the **Alias Name** column and enter the alias.
5. Hover over the **Remark** field. A pin icon appears. Click the icon and the **Edit Note Value** window opens.



6. When you finish entering your remarks, click **OK**. The field will show the first few characters in the field.
7. When finished, click **Save**.

Catalog

The Catalog tab displays all the Catalogs that the selected well is connected to. Refer to "Link Files to Wells" on page 417

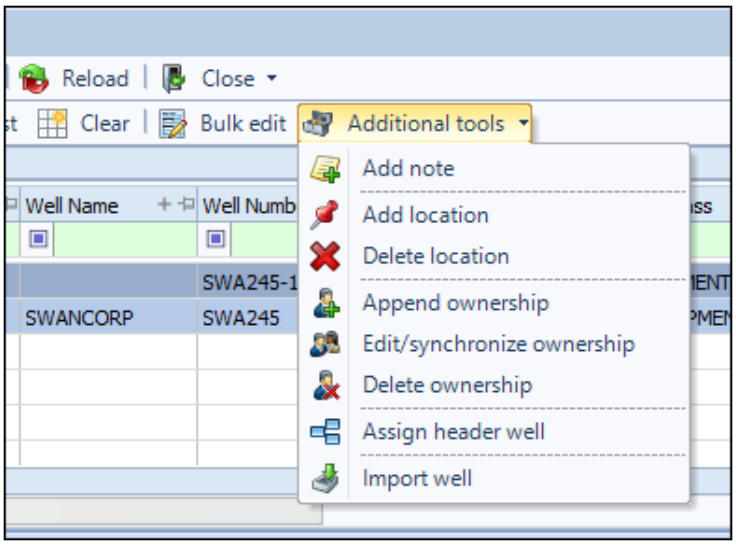
Note:
The table does not allow you to edit the contents of the grid, just open the selected items in the Catalog module or export the selected catalogs to an Excel spreadsheet.

The Catalog tab displays all the Catalogs that the selected well is connected to. Refer to "Link Files to Wells" on page 417

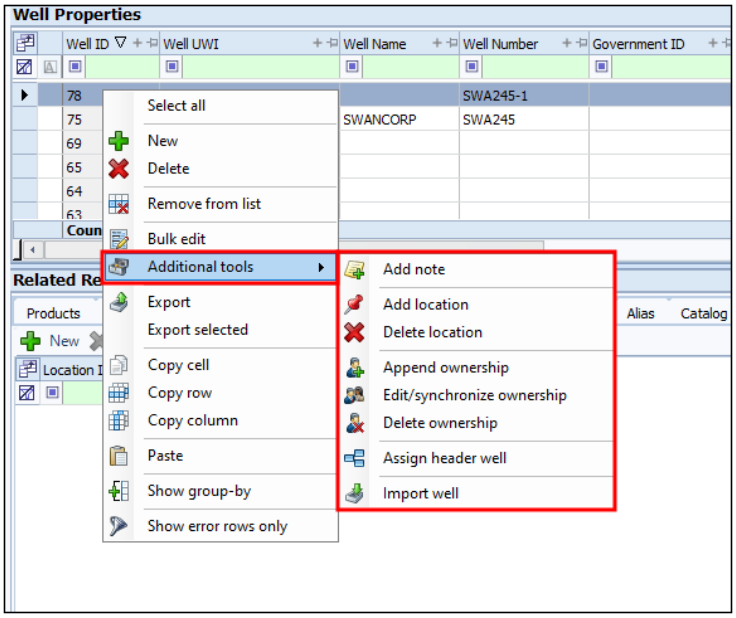
The table does not allow you to modify the contents of the table, just open or export the Catalogs.

Additional Tools

There is an **Additional Tools** button located on the toolbar.



The Additional Tools menu can also be found when you right-click and invoke the context menu.



Some of the actions in the menu appear in other areas of the module, but you if you don't have the Related Records panel open, commands like **Add Note**, **Add Location**, and **Assign Header Well** may be of use.

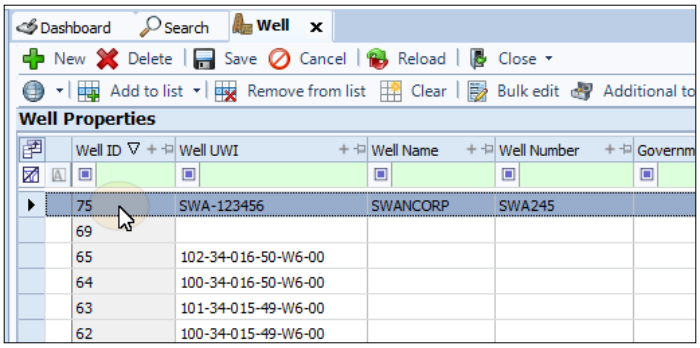
Add or Delete a Location

You can edit Location information for a well without using the Related Records panel.

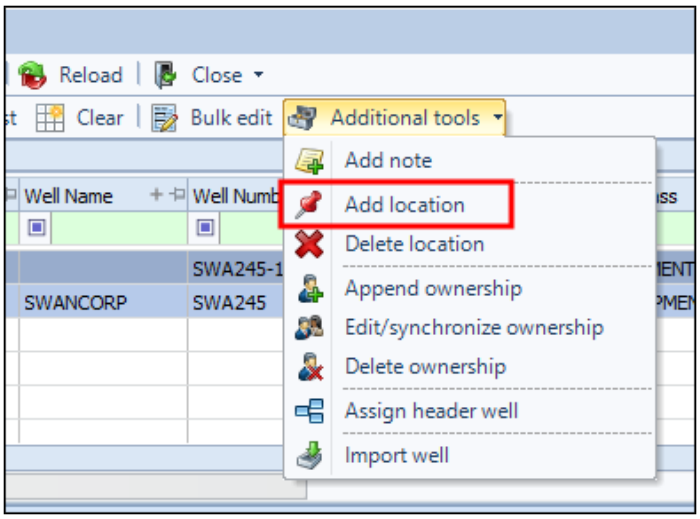
You can either add or delete locations.

To add a Location to a well:

1. In the **Well Properties** panel select a well.

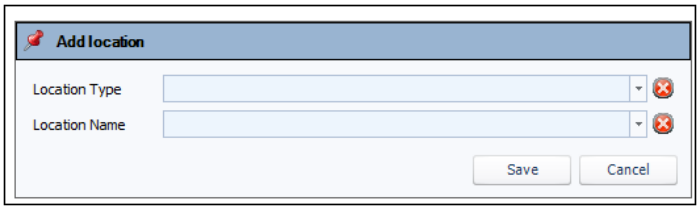


2. Select the **Additional Tools** menu on the tool bar and select **Add location**.



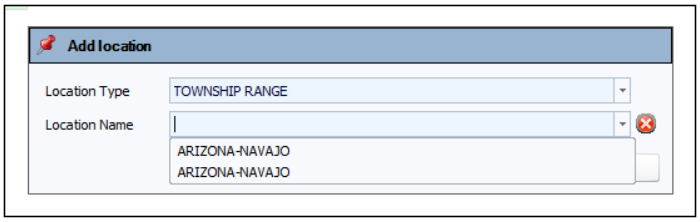
> **Tip:**
> You can also right-click on the well and select **Additional Tools>Add location** from the context menu.

3. The **Add Location** pane will open.



> **Note:**
> A **Location ID** will be assigned to the row automatically. The circular X beside the fields indicates required information. When the fields have been filled and verified the indicator(s) will disappear.

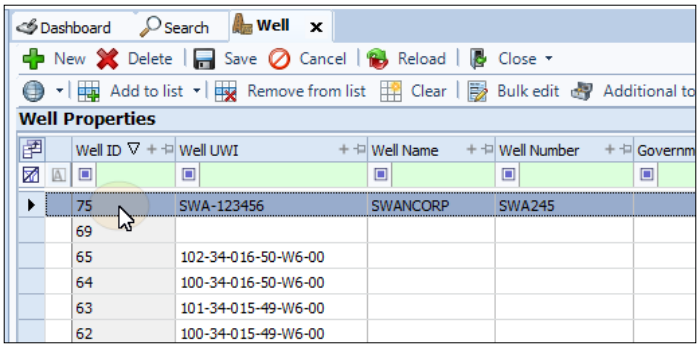
4. Select the information from the drop-down list, or you can double click in a field and type information.



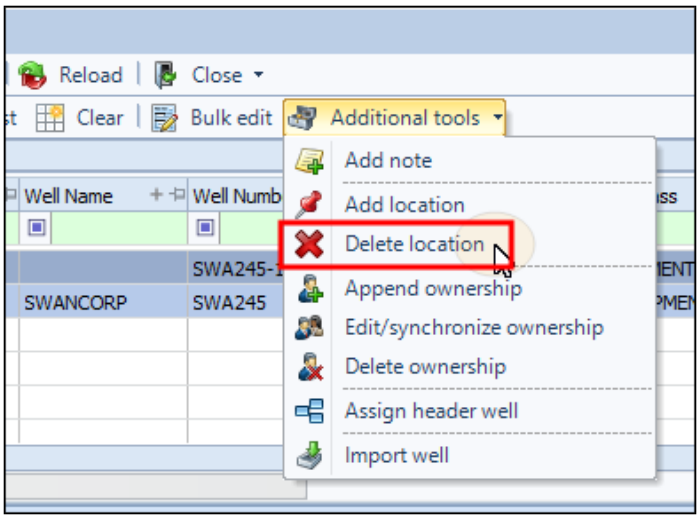
5. Click **Save**. The pane will close and the location will be added under the Locations tab in the Related Records panel.

To delete a Location from a well:

1. In the **Well Properties** panel select a well.

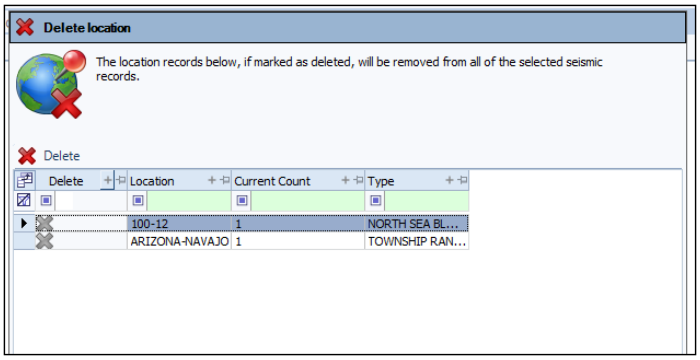


2. Select the **Additional Tools** menu on the tool bar and select **Delete location**.

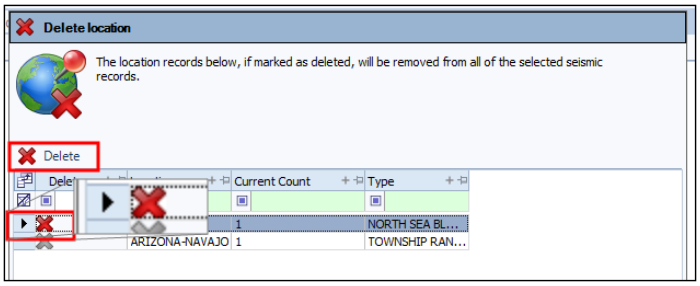

Reload
Close
Clear
Bulk edit
Additional tools
Add note
Add location
Delete location
Append ownership
Edit/synchronize ownership
Delete ownership
Assign header well
Import well
Well Name
Well Numb
SWANCORP
SWA245

> **Tip:**
> You can also right-click on the well and select **Additional Tools>Delete location** from the context menu.

3. The **Delete location** pane will open.



4. Highlight the location or locations you want to delete, then click **Delete**. The records will have an X appear at the head of the row.



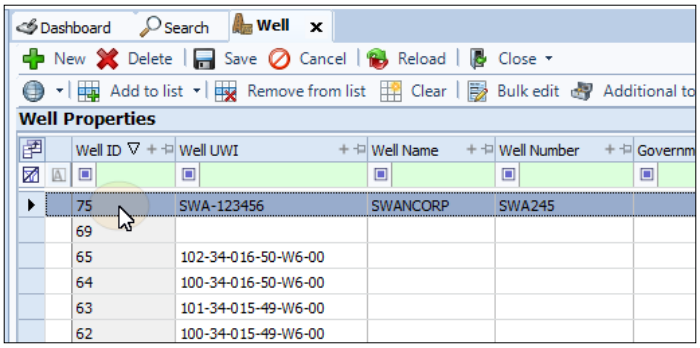
5. Click **Save**.
6. A confirmation disalog will ask if you're sure you want to delete the locations from the well record., Click **OK**. The pane will close and the location will be removed from the Locations tab in the Related Records panel.

Add Notes

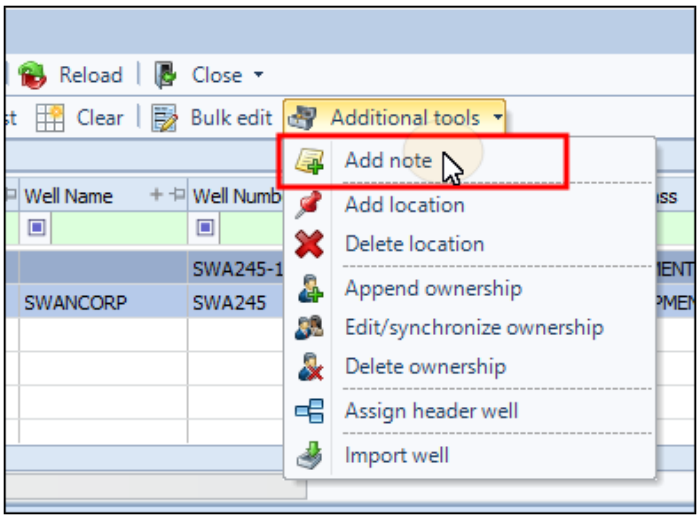
You can add notes or attach a file to a well record.

To add a Note:

1. In the **Well Properties** panel select a well.

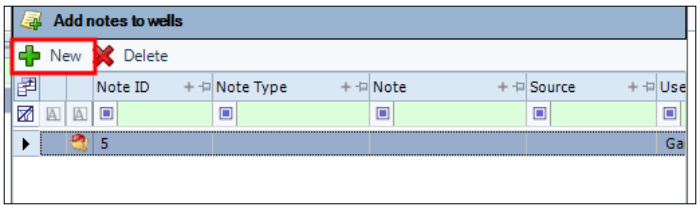


2. From the **Additional Tools** Menu, select **Add Note** from the menu.



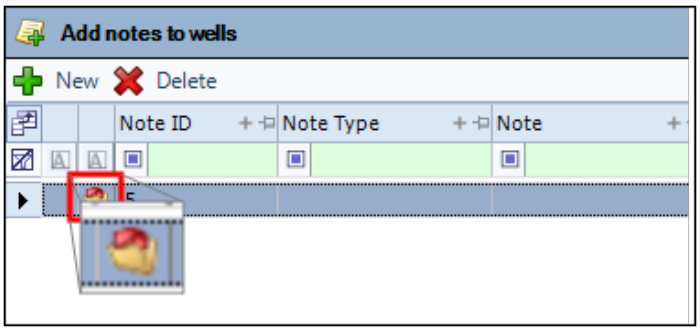
The **Add Notes to Well** pane appears.

3. From the toolbar, click **New**. A blank row will appear in the grid.

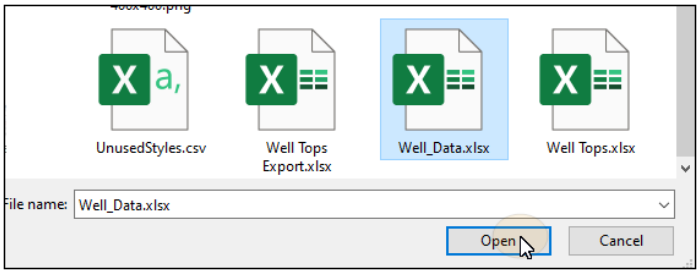


> **Note:**
> A **Note ID** will be assigned to the row automatically.

4. You can attach a file as a note. To do this, click the **Browse** button at the head of the row. An open dialog window will appear.

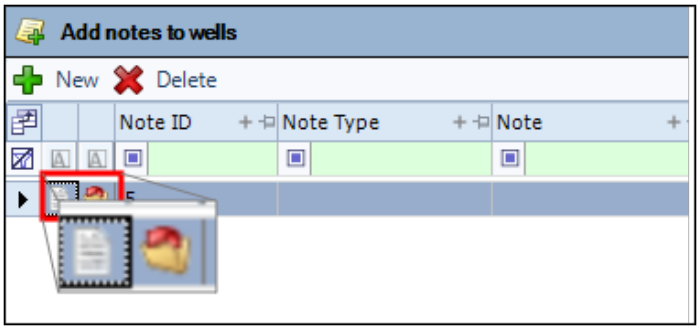


5. Navigate to where the file is stored on your device. Select the file then click **Open**.



The file will be attached. The **File Name** and **Path** columns will be filled out.

6. A **View** button will appear next to the **Browse** button. You can click this button and the attached file will open.



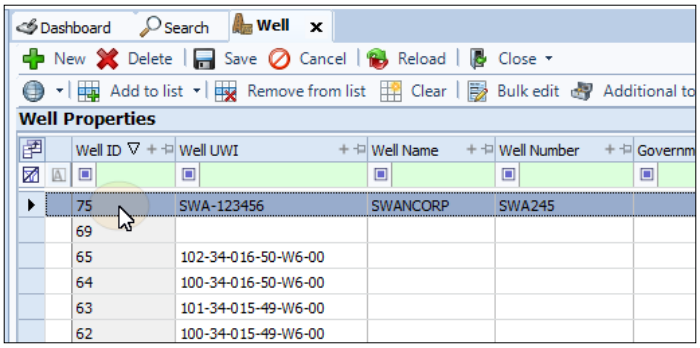
7. Select the **Note Type** from the drop-down list.
8. Hover over the **Note** field. A pin icon appears. Click the icon and enter the text of the note into the field.
9. When you finish entering your notes, press **Return**. The field will show the first few characters of the note.
10. When finished, click **Save**. the **Add Notes to Well** pane will close, and the note will be added to the Notes tab in the Related Records panel.
11. On the toolbar click **Save** to update the well.

Ownership Information

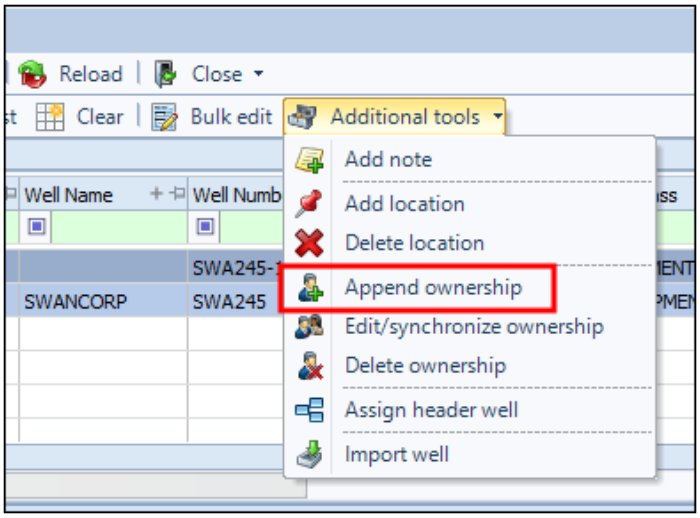
The **Additional tools** populates all assigned ownerships in the edit window for you to review, adjust and synchronize as required.

To append Ownership information:

1. In the **Well Properties** panel select a well.

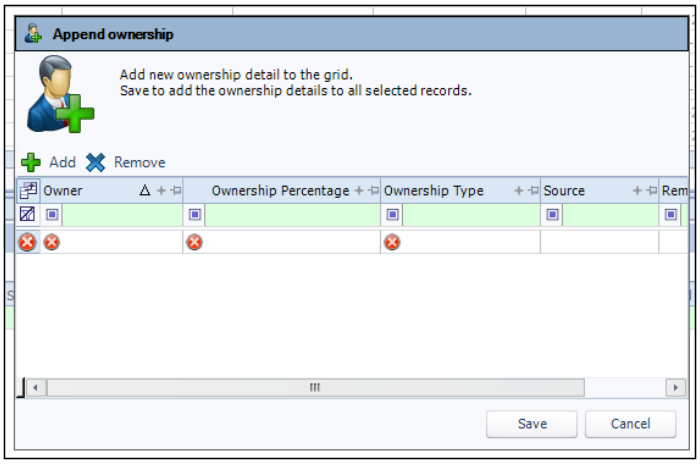


2. Select the **Additional Tools** menu on the tool bar and select **Append ownership**.



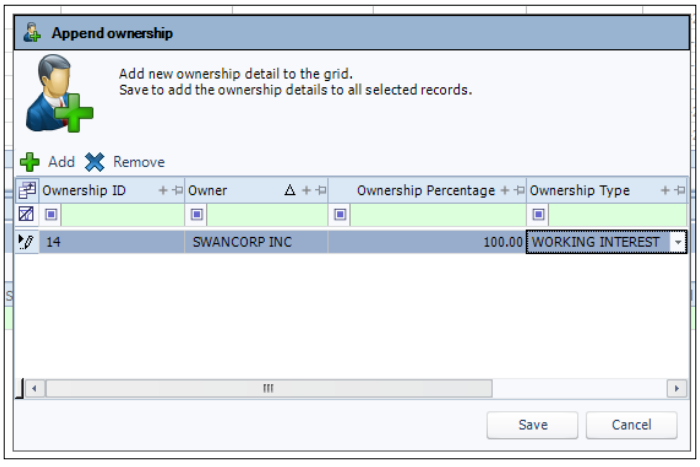
> **Tip:**
> You can also right-click on the well and select **Additional Tools>Append ownership** from the context menu.

3. The **Append ownership** pane will open.



> **Note:**
> An **Ownership ID** will be assigned to the row automatically. The circular X beside the fields indicates required information. When the fields have been filled and verified the indicator(s) will disappear.

4. Select the information from the drop-down list, or you can double click in a field and type information.



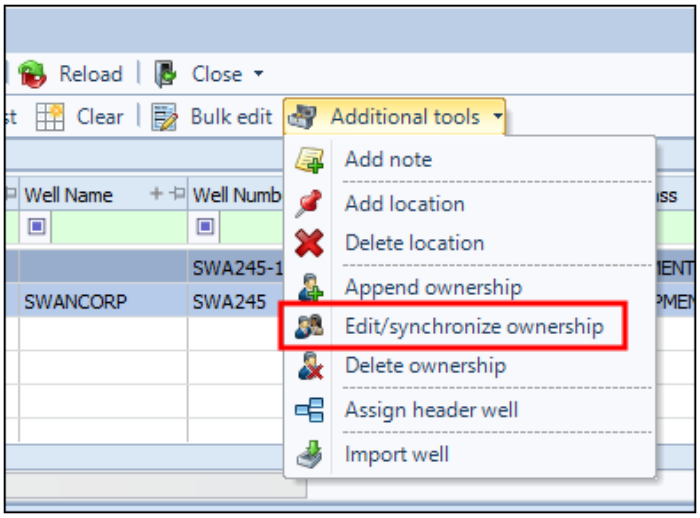
> **Note:**
> You can add multiple owners by clicking the **Add** button. Repeat as required.

5. Click **Save**. The pane will close and the location will be added under the **Owners** tab in the **Related Records** panel.

Editing ownership for multiple wells

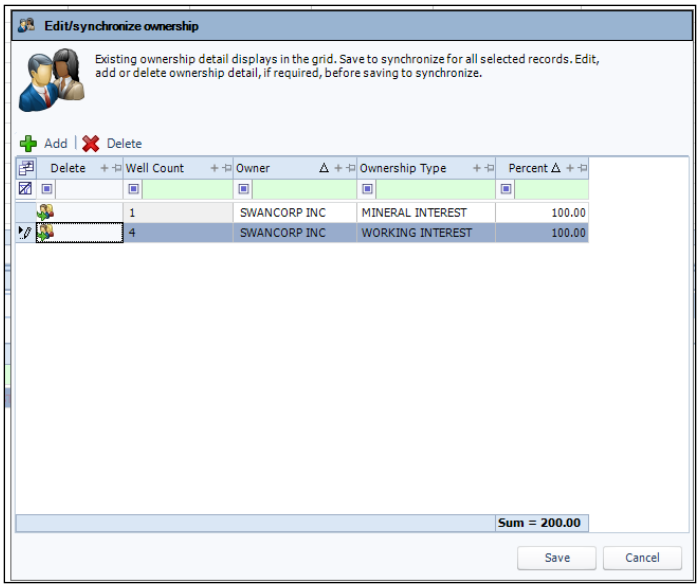
To edit ownership for multiple items:

1. In the main grid, select the record(s) to edit. You can either hold **shift** then click on consecutive well records, or hole the **Ctrl** key and click on non-consecutive
2. Click **Additional tools>Edit/synchronize ownership** in the local toolbar



> **Tip:** You can also right-click in the grid to open the context menu and click **Additional tools>Edit/synchronize ownership**.

3. In the **Edit/synchronize ownership** pane, enter the relevant details.

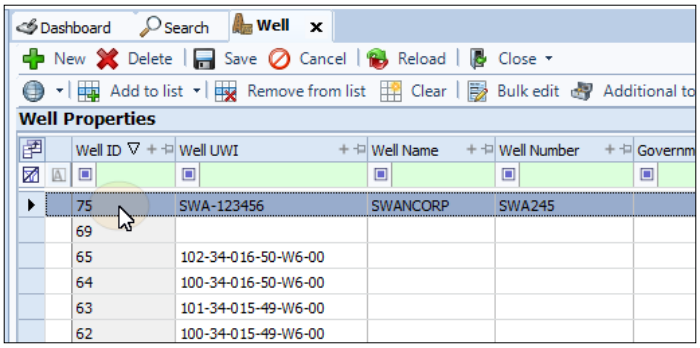


4. To edit the **Ownership Type** and**Ownership Sub Type**, select the checkbox and select an entry for one or both fields. Refer to the acquisition ownership details to update.
5. To add a new ownership, click **Add** and enter the detail in the grid. Enter the required detail.
6. To delete an ownership, select the record on the grid and click **Delete** .

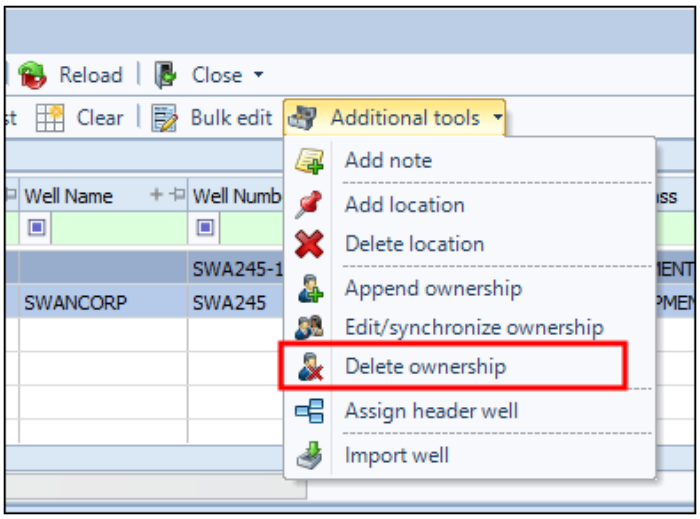
7. When your edits are complete, click **Save**. The changes affect all of the records you selected before opening the edit window.

To delete an owner from a well:

1. In the **Well Properties** panel select a well.

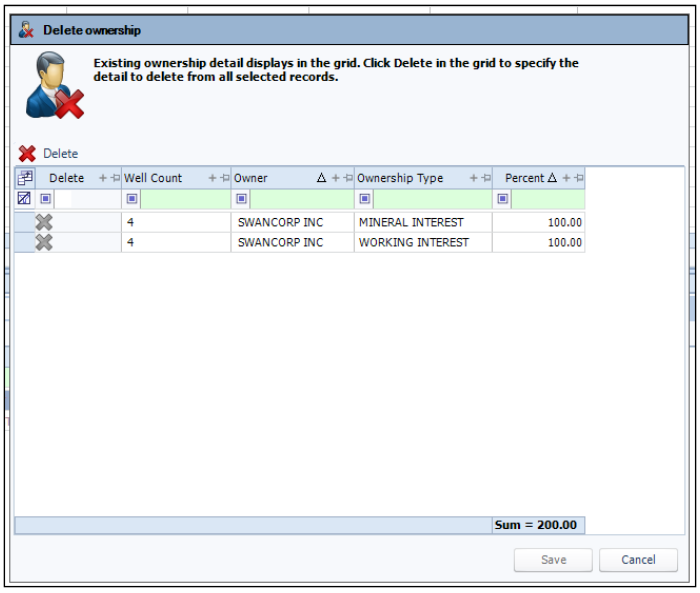


2. Select the **Additional Tools** menu on the tool bar and select **Delete ownership**.

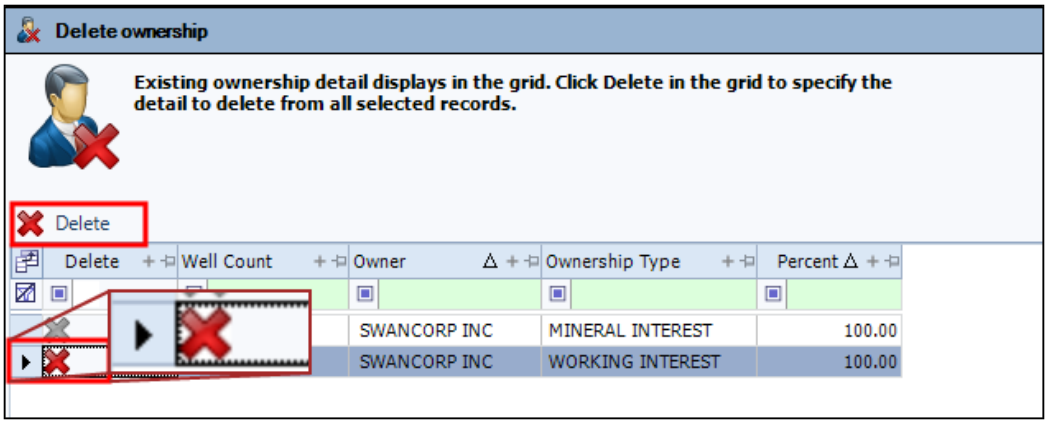


> **Tip:**
> You can also right-click on the well and select **Additional Tools>Delete ownership** from the context menu.

3. The **Delete ownership** pane will open.



4. Highlight the owner or owners you want to delete, then click **Delete**. The records will have an X appear at the head of the row.



5. Click **Save**.A confirmation dialog will ask if you're sure you want to delete the locations from the well record.
6. Click **OK**. The pane will close and the location will be removed from the **Owners** tab in the Related Records panel.

3.3 Files

The **File** module is for viewing, editing and moving data. The **File** module offers several features and tools for editing and updating the details of your file records.

New in this version:

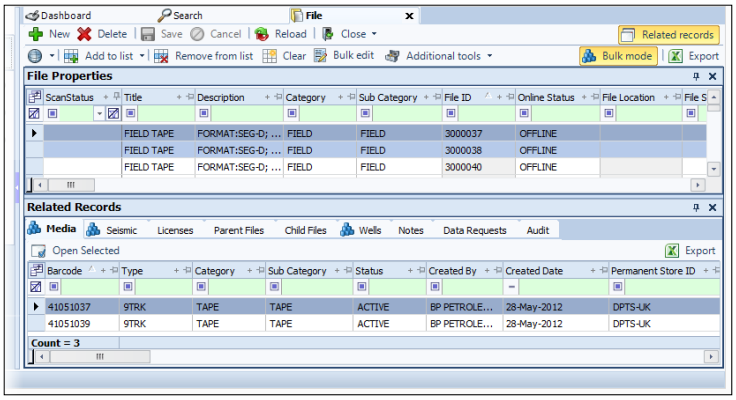
- Added a configuration option to allow a user to download files from an alternate server by default.
- Updated the “sum” on the “File Size” column to be in GB instead of KB.

To open items in the **File** module:

1. Click **search** next to **File** in the Navigation panel.
2. Select the appropriate search type and the search window will open
3. Enter your filter values and click **Search**.

The results open in the **File** module. The **File Properties** grid displays the information for each item. To view the **Related Records** for an item, click on a row in the **File Properties** grid and the associated details display in the **Related Records** tabs.

To view the **Related Records** for multiple items, turn on **Bulk Mode**, select multiple items in the **File Properties** grid and the associated information for all selected items display in the **Related Records** tabs.



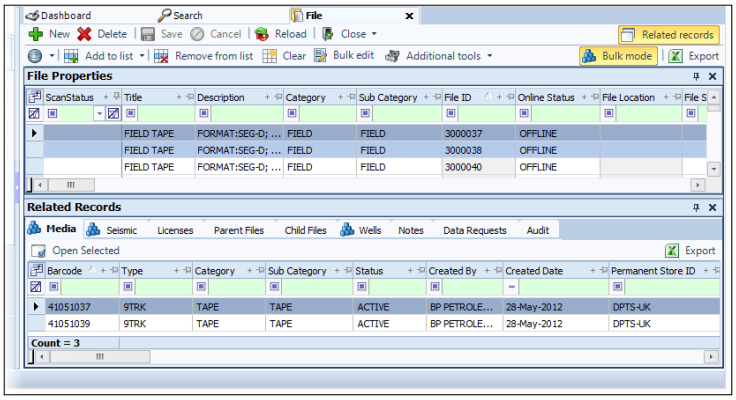
The **File** module is for viewing, editing and moving data. The **File** module offers several features and tools for editing and updating the details of your file records.

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To view the **Related Records** for multiple items, turn on **Bulk Mode**, select multiple items in the **File Properties** grid and the associated information for all selected items display in the **Related Records** tabs.



Editing File Properties detail

The **File Properties** grid displays information for records. If you have been given the appropriate permissions you can edit information in a record.

To edit an individual record:

- Locate the item in the **File Properties** grid and click in a cell of the category column.
- Depending on the data in the cell, you can manually type the information or select a property from drop-down menus.
- When finished editing a record, click **Save**.

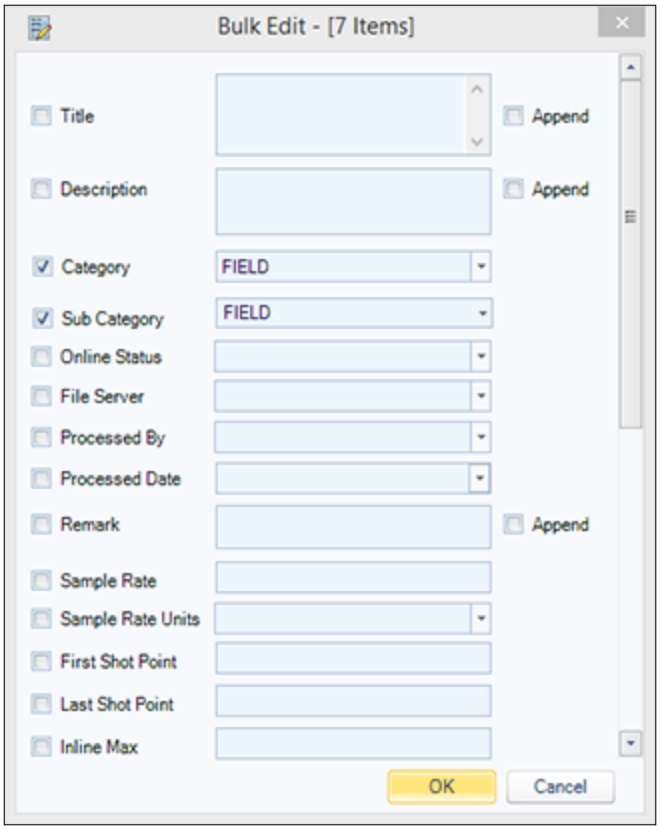
To edit one or more details that are shared across multiple records, you can use **Bulk edit**.

1. Select the records to edit:
   - To select multiple **consecutive** rows, click and drag in the columns in the grid.
   - To select multiple **individual** rows, press **Ctrl**+click to select the row.
2. After selecting the rows, click **Bulk edit** in the toolbar.

   Tip: You can right-click on the selected row and click **Bulk edit** in the context menu.

   The **Bulk edit** window opens.

3. Enter (or select via drop-down lists) the information for each field to be updated for the selected rows.

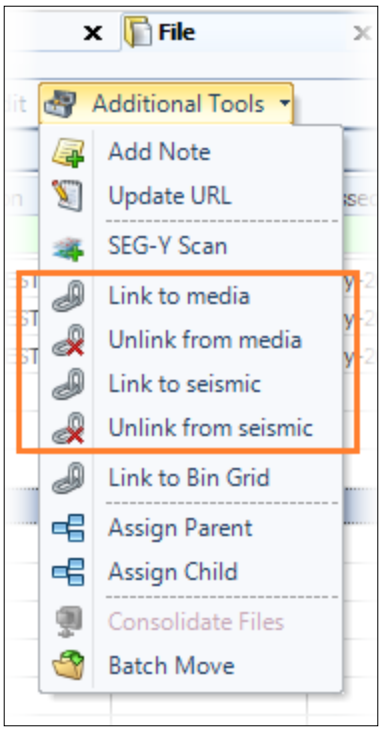


4. In select fields you have an option to add additional information to the contents, select the **Append** checkbox
5. When finished, Click **OK** then click **Save**.

Linking files

To link, or relink, a file to a media or seismic, use the linking options in **Additional Tools**.

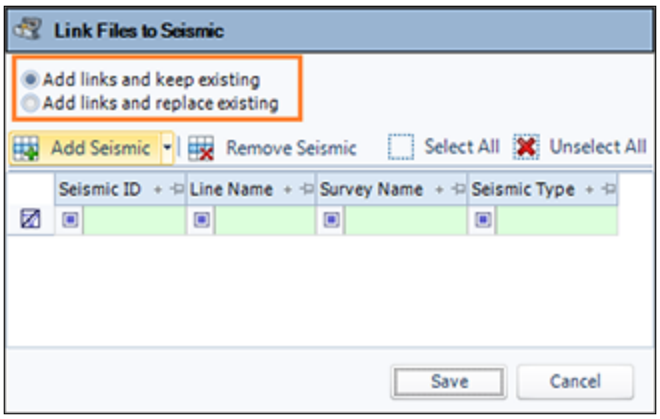
1. In the **File Properties** grid, use one of the following methods to select the items to be linked:
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
   - To select multiple individual rows, press Ctrl + Click to select.
2. After selecting the rows, click **Additional Tools** in the toolbar and select **Link Files to Media** or **Link Files to Seismic**.


File
Additional Tools
Add Note
Update URL
SEG-Y Scan
Link to media
Unlink from media
Link to seismic
Unlink from seismic
Link to Bin Grid
Assign Parent
Assign Child
Consolidate Files
Batch Move

> **Tip:**
> You can right-click to open the context menu, then select **Additional Tools>Link to Media** or **Additional Tools>Link to Seismic**.

> **Note:**
> Depending on your menu choice a window will open with some differences. Some of the features are the same. Differences will be noted below.

3. Whether linking media or seismic records, the first option in the window is to configure whether you want to add links and keep the existing links to the source and add new ones, or to add new links and the replace existing ones.
4. Click **Add Seismic** or **Add Media** depending on the window open.



> **Note:**
> Depending on the window open, you will have a Media Search or Search Seismic window appear.

The search results will appear in the window.

5. Select the check boxes to select the records from the search results then click **Save**.

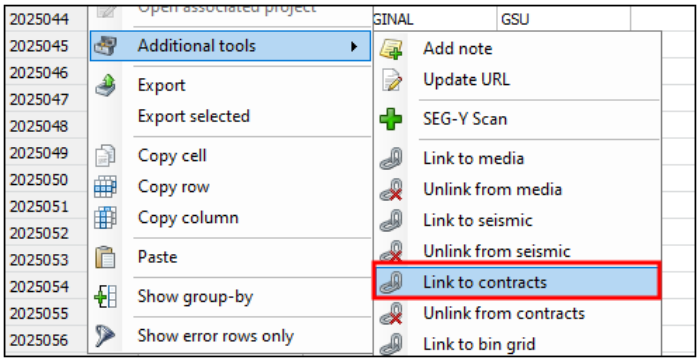
Link Contract to a file

In the Files module, you can assign files in the grid to contracts.

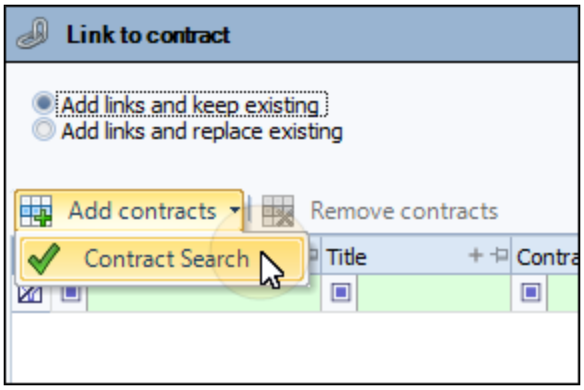
To assign a Contract to one or more files:

1. Use one of the following methods to select file(s) in the File Properties grid in the Files Module:
   - Click to select a single row.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
   - > **Note:**
     > To select multiple individual rows, press **Ctrl** while clicking to select.
2. Right-click on a selected row to open the context menu.

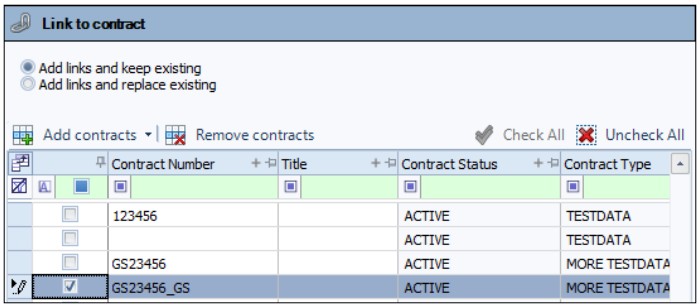
3. Select **Additional Tools>Link to Contracts**.



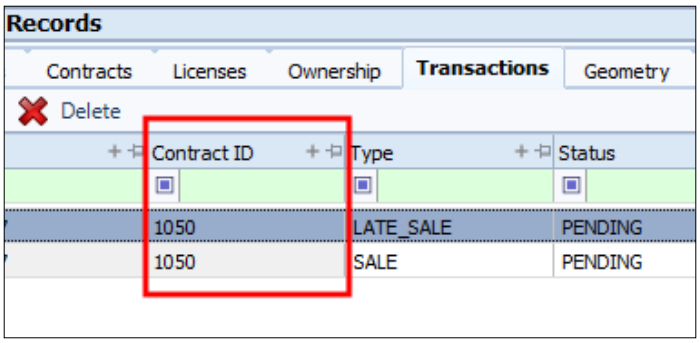
4. In the Link to contract window select **Contract Search** from the Add Contracts drop-down.



5. Enter your search criteria, then click **Search**. The results will populate the grid in the Link to contracts window.
6. From the results, select the check box next to the contract to be linked.



7. Select the option to either add links and keep existing or to add links and replace existing for the selected files.
8. Click **Save**. The contract will appear in the Contracts Tab in the Related Records panel.



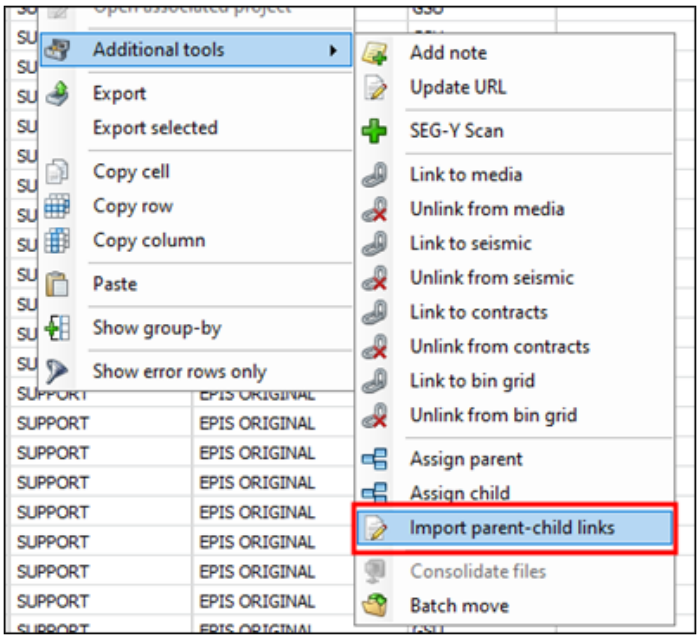


Import Parent-Child Links

You can import Parent-Child links for a file from a Microsoft® Excel® file.

To Import Parent-Child links:

1. Use one of the following methods to select file(s) in the File Properties grid in the Files Module:
   - Click to select a single row.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
   - To select multiple individual rows, press Ctrl while clicking to select.
2. Right-click on a selected row to open the context menu.
3. Select **Additional Tools>Import parent-child links**.



4. You will be asked to navigate to the location of the Excel file of parent-child links to import.
5. Click **Open**.

> **Note:**
> The spreadsheet will be expected to have the two columns for the master and child column names.

6. Each link is validated for data integrity. If any link fails validation, the file will not be imported.

   Once imported, the links can be viewed from the Parent or Child Files tabs in the Related Records panel.



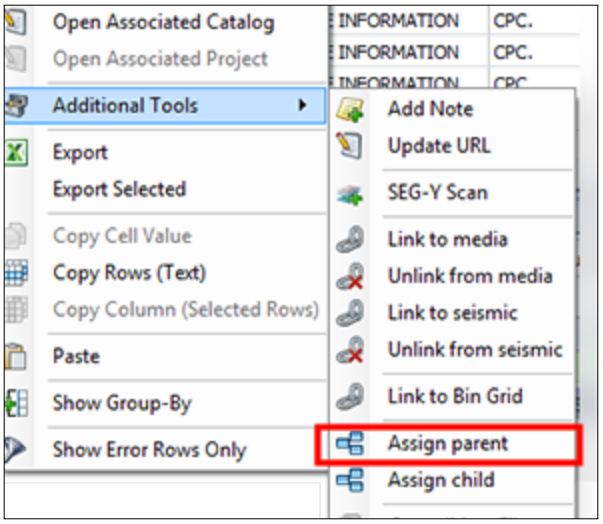
Assigning a parent file

Use the main **File Properties** grid to assign a parent file and use the **Parent File** tab in the **Related Records** area to view the results.

Exploration Archives accommodates a many-to-many relationship for parent and Related Records. A parent record can have multiple children and a child record can have multiple parents.

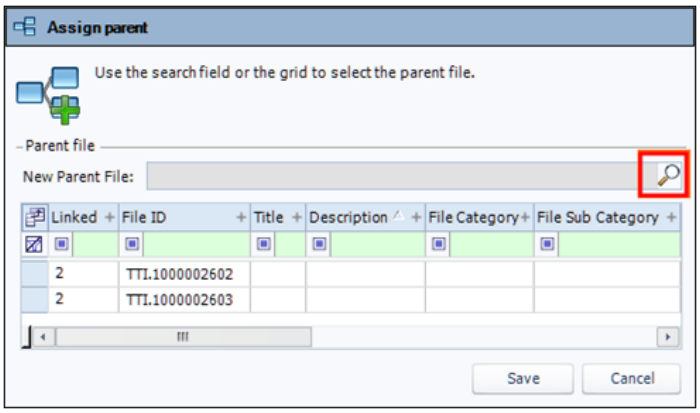
To assign a parent to one or more items:

1. Use one of the following methods to select the item(s) in the **Grid** to create a parent relationship:
   - Click to select a single row.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
   - To select multiple individual rows, press Ctrl while clicking to select.
2. Right-click on a selected row to open the context menu.
3. Point to **Additional tools**.
4. Select **Assign parent** .



The **Assign parent** window opens.

5. Either select an item in the grid or search for the parent item(s) to assign and select.



- If you select an item in the grid, that item will become the parent of the others in the **Grid**.
- If you search and select an item, the new item will become the parent of the others in the **Grid**.

6. Click **Save**.
   The assigned parent record displays in the associated tab in the **Related Records** panel.

Assign a child file

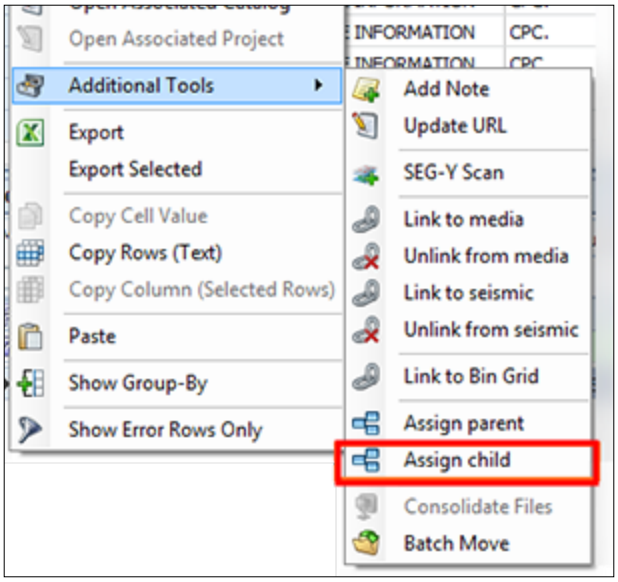
Use the main **File Properties** grid to assign a child file and use the **Child File** tab in the **Related Records** area to view the results.

Exploration Archives accommodates a many-to-many relationship for parent and Related Records. A parent record can have multiple children and a child record can have multiple parents.

To assign a child to one or more items:

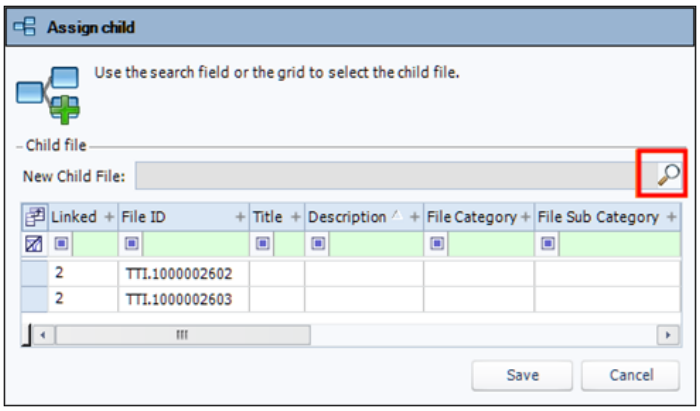
1. Use one of the following methods to select the item(s) in the **Grid** to create a child relationship:
   - Click to select a single row.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
   - To select multiple individual rows, press Ctrl while clicking to select.
2. Right-click on a selected row to open the context menu.
3. Point to **Additional tools**.

4. Select **Assign child**.



The Assign child window opens.

5. Either select an item in the grid or search for the child item(s) to assign and select.



- If you select an item in the grid, that item will become the child of the others in the **Grid**.
- If you search and select an item, the new item will become the child of the others in the **Grid**.

6. Click **Save**.
The assigned child record displays in the associated tab in the **Related Records** panel.

SEG-Y Scan™ in The Files module

SEG-Y Scan converts your SEG-Y data files into compressed replicas for quick viewing. The scanning process extracts the set of coordinates, data from the EBCDIC header, SEG-Y attributes and SEG-Y cataloging detail. Using the extracted data,

Exploration Archives generates images that you can view using SEG-Y SnapShot.

The generated images include:

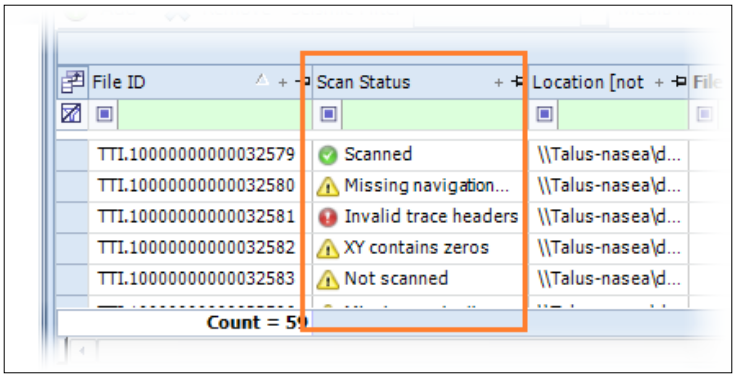
- Live trace outline for each file
- Amplitude map
- Time sections
- Time slice
- Histogram of trace sample values

Identifying the scan status

In the **File** module, the **Scan Status** column in the **File Properties** grid indicates whether a file has been scanned or not.

Files in a .sgy format are available for scanning and display a status in the **Scan Status** column as follows:

- **Not Scanned**: SEG-Y file has not been scanned
- **Scanned** : File was successfully scanned and outputs are available for viewing in SEG-Y SnapShot
- **Missing Data**: The scan process was unsuccessful because data is missing from the file
- **Missing Navigation Data**: The scan process was unsuccessful because navigation data is missing from the file



To view scanned files, refer to "Viewing files with SEG-Y Snapshot from Files module" on page 198.

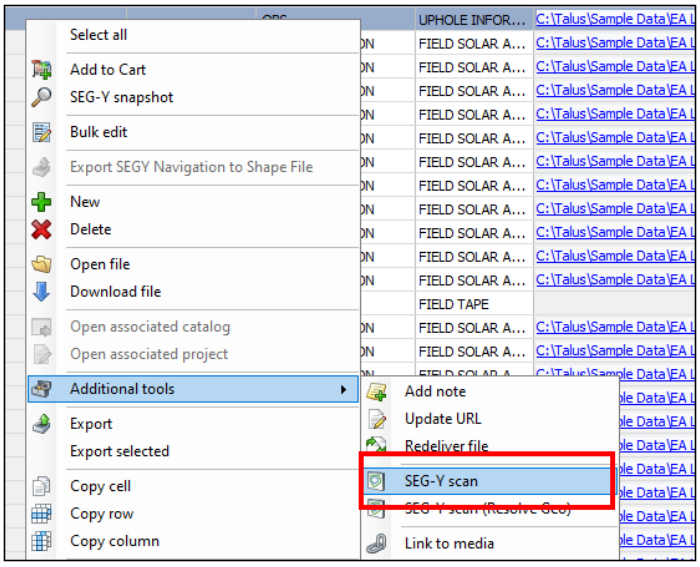
To scan files using SEG-Y Scan, refer to "Adding files to SEG-Y Scan " below.

Adding files to SEG-Y Scan

In the **File** module, files that are in a .sgy format are available for scanning.

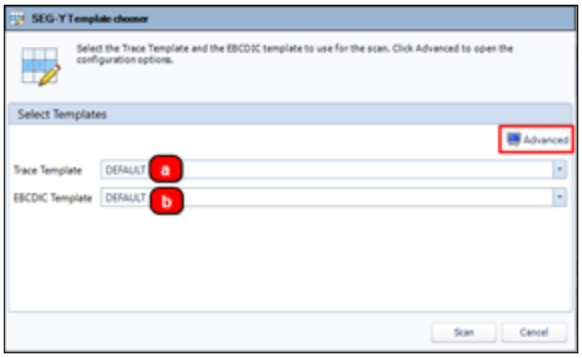
To prepare **SEG-Y Scan** for scanning files:

1. Use one of the following methods to select the files to add to SEG-Y Scan:
   - Click to select one row in the **Grid** grid.
   - To select multiple individual rows, press Ctrl while clicking to select.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
2. Right-click on a selected row, point to **Additional tools** and click **SEG-Y Scan** in the context menu.



3. The **SEG-Y Template chooser** window opens.
4. When the **SEG-Y Template chooser** window opens it is in the **Basic** scanning mode. In this mode, all the files are scanned with the same Trace and EBCDIC templates.

   To configure a scan in Basic mode:



   a. Select the Trace Template from the drop-down list.
   b. Select the EBCDIC Template from the drop-down.

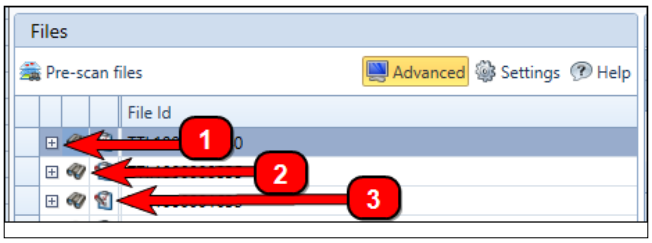
   > **Note:**
   > In some environments, this field may be optional.

5. Click **Advanced** adjust settings for each selected file.

The Advanced widow is divided into 3 panels:

- **Files**:

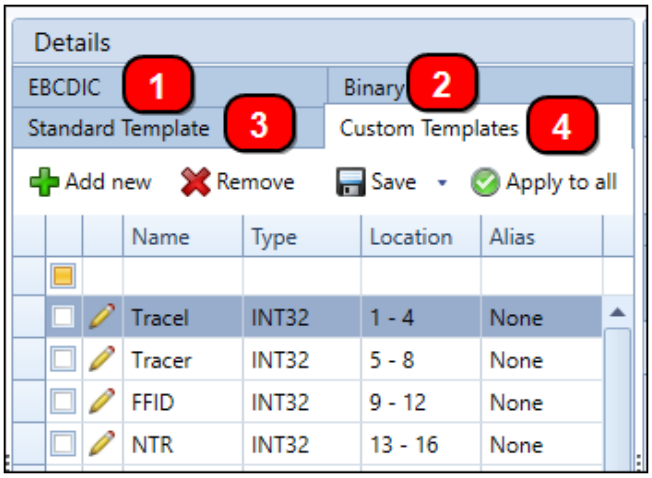
  This panel displays all the records that have been selected for scanning. Each row represents one record. There are 3 icons available with each record:



  1. **Information**: When you select this icon a dialogue will open showing the information for the record.
  2. **Inspection**: Activates the Inspection Process and activates the Quality Control panel. Inspection parses the EBCDIC and Binary Headers and a Trace Header if one is assigned.
  3. **Custom Template**: Overrides the existing Trace Template on the file. This will force the scan to run the file in custom mode using the override.

- **Details**:

  The Panel is broken into 4 tabs:



  1. **EBCDIC**: Displays the EBCDIC Header in ASCII format.
  2. **Binary**: Displays the values from the binary header
  3. **Standard Template**: Provides the standard byte locations. Select the standards to use for reading the data from the SEG-Y File.

     To save the selected standards to use as a template right-click and select **Add to template**.

To set an alias to use when generating the spacing and sawtooth validations, right-click and select Set alias and select the alias to use.

4. **Custom Templates**: Displays the trace template details based on your selected template.

   It includes the option to **Add new** or **Remove** templates from the custom list.

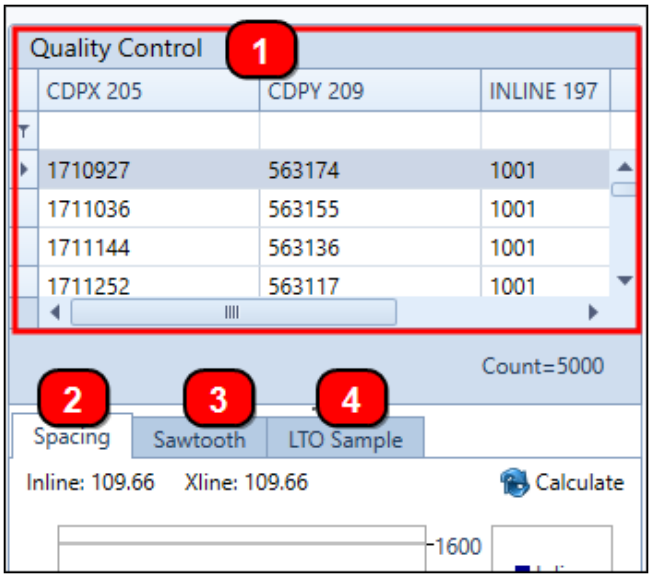
   To save template options to a new template, click the **Save** drop-down and select **Save as new template**.

   Edit an existing template by selecting the Pencil icon.

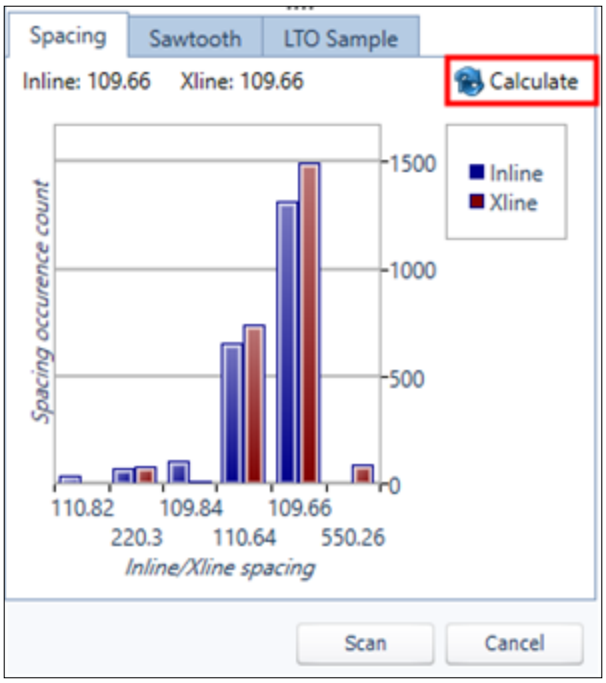
   Select the templates on the list then click **Save**.

» **Quality Control**:

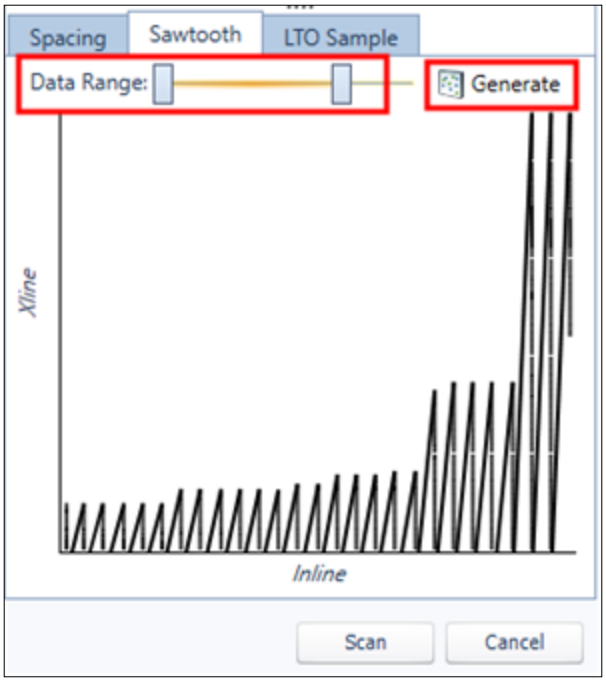
The panel is divided into 4 sections:



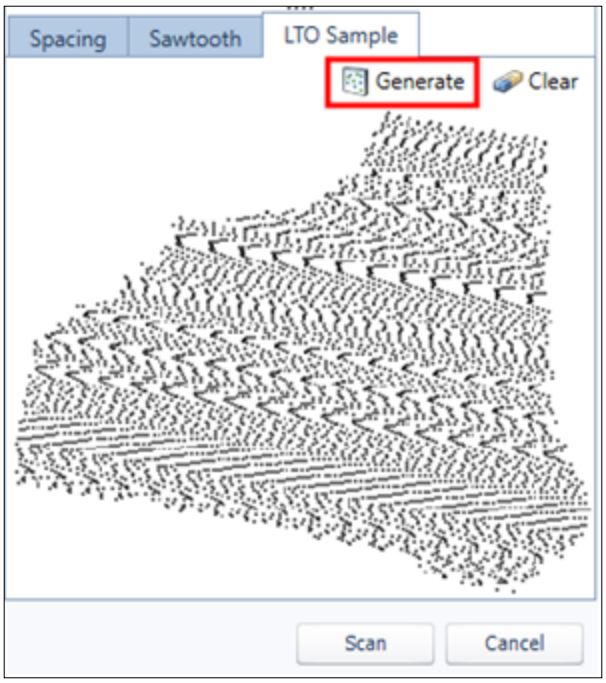
1. **Grid**: The grid displays the trace data from the SEG-Y based on the selected standard and custom templates. The values in this grid are used to generate the spacing and sawtooth charts.
2. **Spacing**: Click **Calculate** to view the spacing on a graph



3. **Sawtooth**: Click **Generate** to see a graphical representation. Use the **Data Range** slider to change the number of traces being used.



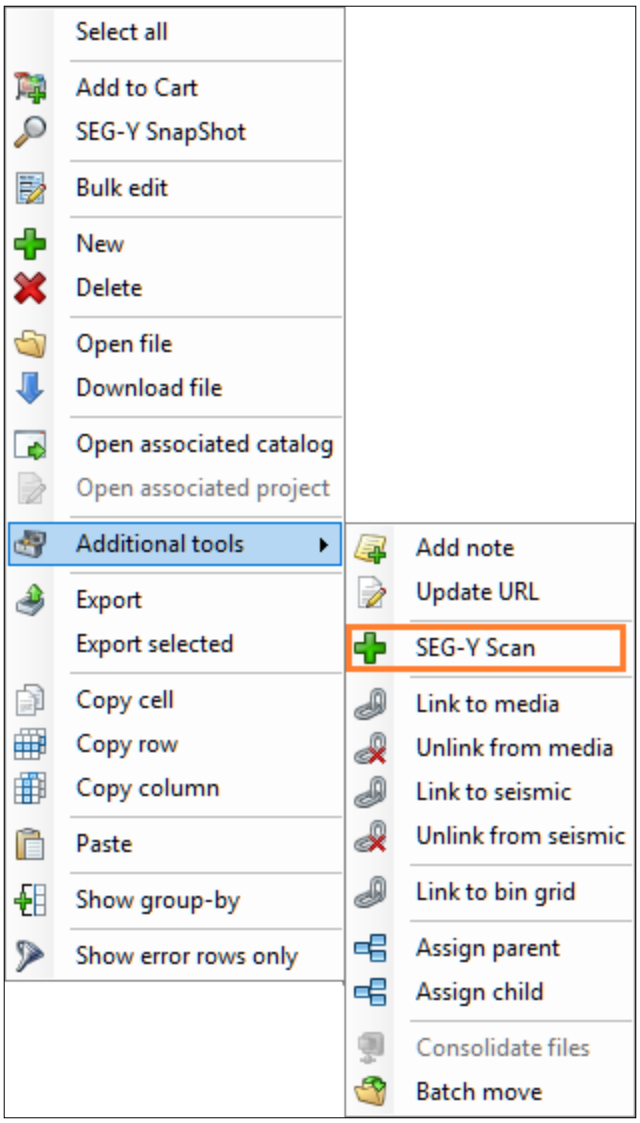
4. **LTO Sample**: click Generate to create the sample. To clear the panel, click **Clear**.



In the **File** module, files that are in a .sgy format are available for scanning.

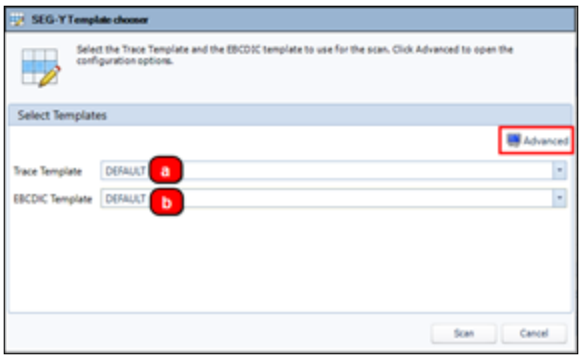
To prepare **SEG-Y Scan** for scanning files:

1. Use one of the following methods to select the files to add to SEG-Y Scan:
   - Click to select one row in the **Grid** grid.
   - To select multiple individual rows, press Ctrl while clicking to select.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
2. Right-click on a selected row, point to **Additional tools** and click **SEG-Y Scan** in the context menu.



3. The **SEG-Y Template chooser** window opens.
4. When the **SEG-Y Template chooser** window opens it is in the **Basic** scanning mode. In this mode, all the files are scanned with the same Trace and EBCDIC templates.

   To configure a scan in Basic mode:



a. Select the Trace Template from the drop-down list.

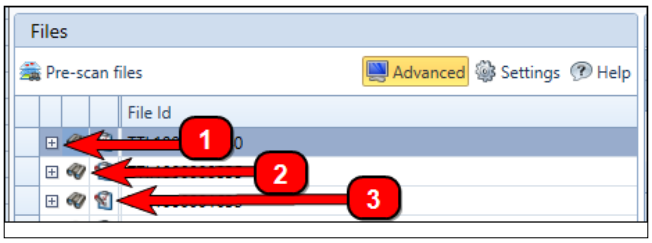
b. Select the EBCDIC Template from the drop-down.

5. Click **Advanced** adjust settings for each selected file.

   The Advanced widow is divided into 3 panels:

   - **Files**:

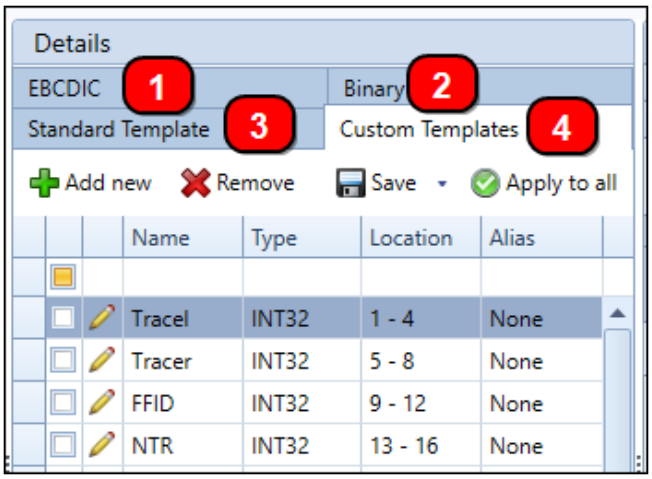
     This panel displays all the records that have been selected for scanning. Each row represents one record. There are 3 icons available with each record:



     1. **Information**: When you select this icon a dialogue will open showing the information for the record.
     2. **Inspection**: Activates the Inspection Process and activates the Quality Control panel. Inspection parses the EBCDIC and Binary Headers and a Trace Header if one is assigned.
     3. **Custom Template**: Overrides the existing Trace Template on the file. This will force the scan to run the file in custom mode using the override.

   - **Details**:

     The Panel is broken into 4 tabs:



1. **EBCDIC**: Displays the EBCDIC Header in ASCII format.
2. **Binary**: Displays the values from the binary header
3. **Standard Template**: Provides the standard byte locations. Select the standards to use for reading the data from the SEG-Y File.

   To save the selected standards to use as a template right-click and select **Add to template**.

   To set an alias to use when generating the spacing and sawtooth validations, right-click and select Set alias and select the alias to use.
4. **Custom Templates**: Displays the trace template details based on your selected template.

   It includes the option to **Add new** or **Remove** templates from the custom list.

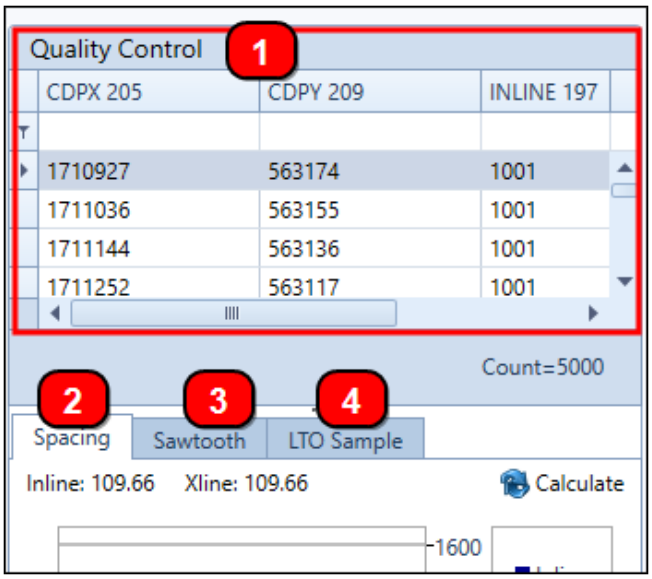
   To save template options to a new template, click the **Save** drop-down and select **Save as new template**.

   Edit an existing template by selecting the Pencil icon.

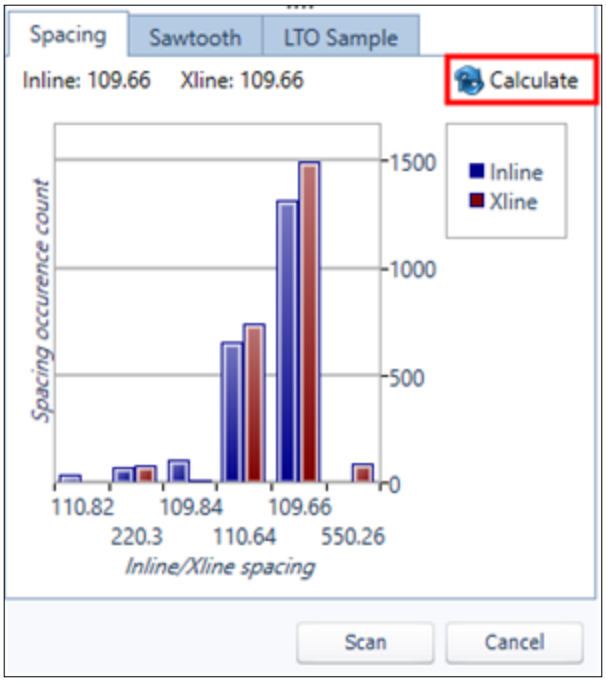
   Select the templates on the list then click **Save**.

» **Quality Control**:

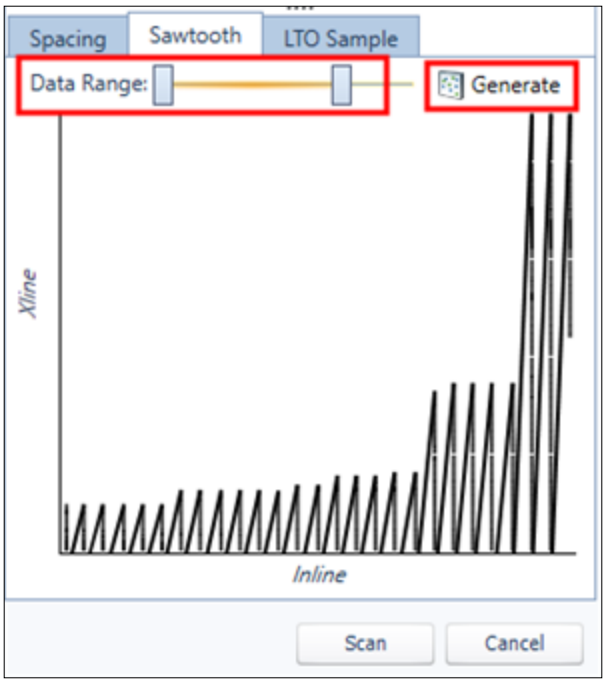
The panel is divided into 4 sections:



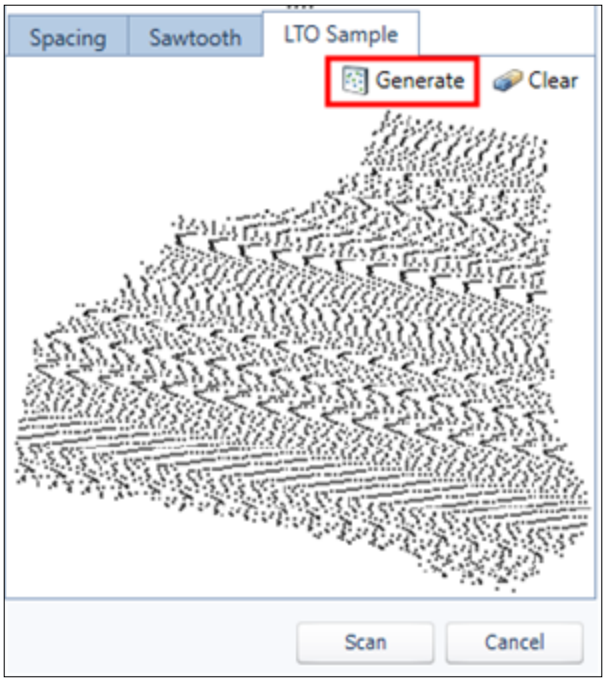
1. **Grid**: The grid displays the trace data from the SEG-Y based on the selected standard and custom templates. The values in this grid are used to generate the spacing and sawtooth charts.
2. **Spacing**: Click **Calculate** to view the spacing on a graph



3. **Sawtooth**: Click **Generate** to see a graphical representation. Use the **Data Range** slider to change the number of traces being used.



4. **LTO Sample**: click Generate to create the sample. To clear the panel, click **Clear**.



To start the scan process, refer to Starting SEG-Y Scan.

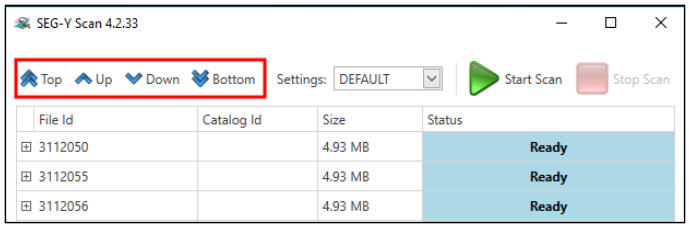
Starting SEG-Y Scan

After adding files to SEG-Y Scan and specifying the settings, you can start the scan process.

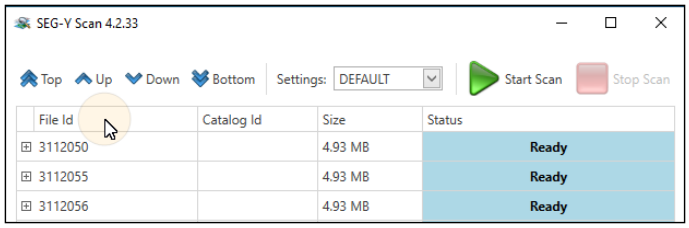
SEG-Y Scan opens with the selected files listed with a **Ready** status.

The application performs the scan in the order that the files are listed. Before starting the scan, you can change the priority order of the files.

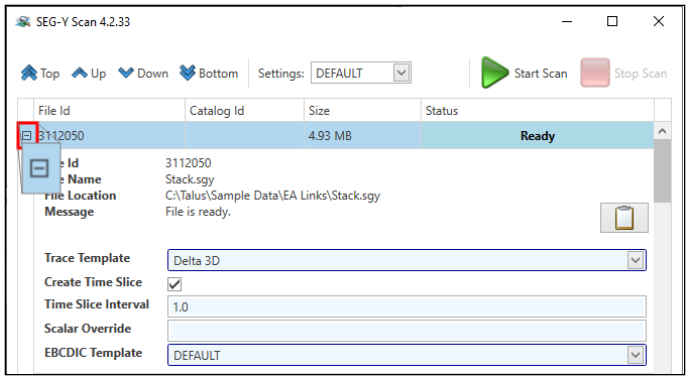
- To move a file to a different priority in the list, select the file move it using the **Top**, **Up**, **Down** and **Bottom** buttons.



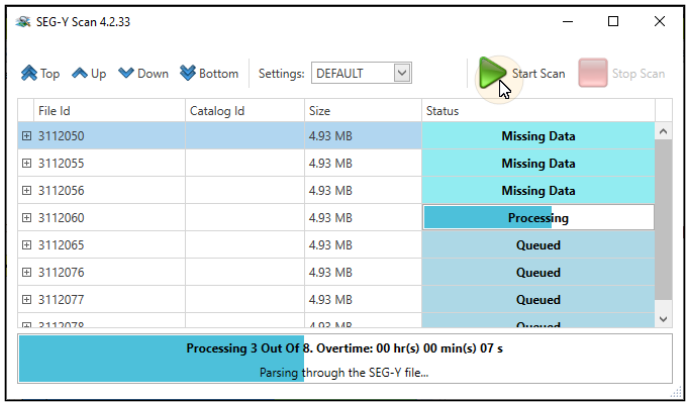
- To display the list either ascending or descending by column category, click the column header.



» To view file details or to change the specified template for a file, click the down arrow in the leader column to expand the file information.



» Click **Start** when you are ready to begin the scan. As the scan progresses, the **Status** column displays the status of each file.



When complete, an information window opens and displays the result details of the scan. Click **OK**. The **SEG-Y Scan** window remains open for you to continue working.

To view the scan results in the **File Properties** grid, click **Reload** in the workspace toolbar. The **Scan Status** updates in the grid and displays detail for any files that had missing data.

SEG-Y Scan operates independently from Exploration Archives and will not interfere with performance. You can continue working in Exploration Archives while the scan completes.

For quick access to **SEG-Y Scan** while in progress, click on the icon in your taskbar

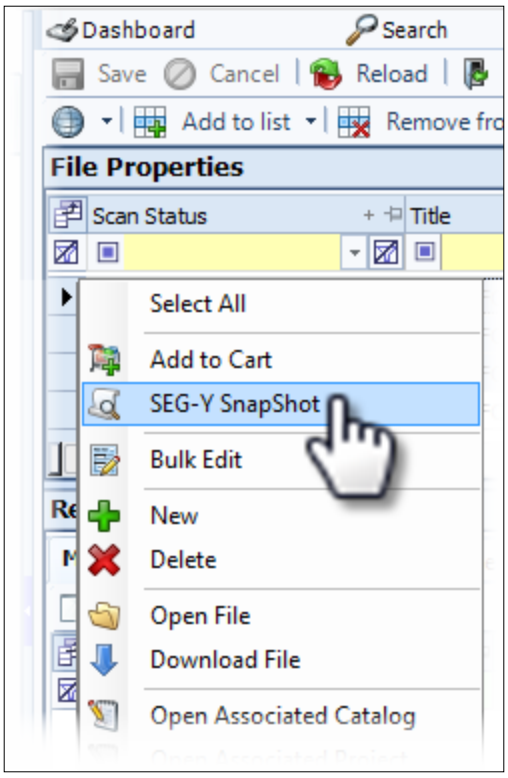
Viewing files with SEG-Y Snapshot from Files module

Files that appear in the **Grid** with a **Scanned** status are available for viewing in **SEG-Y SnapShot**. To scan files with a **Not Scanned** status, or to re-scan files marked as missing data or navigation, refer to "Adding files to SEG-Y Scan " on page 185.

The "snapshots" of your SEG-Y are compressed replicas for a quick view of time slices, live trace outline, time section and the EBCDIC header detail.

To view files in **SEG-Y SnapShot**:

1. To locate SEG-Y files in the **File Properties** grid, use the filter row of the **Location** column and enter ".sgy".
2. Use one of the following methods to select **Scanned** files for viewing:
   - Click to select one row in the grid.
   - To select multiple individual rows, press Ctrl while clicking to select.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
3. Right-click on a selected row and select **SEG-Y SnapShot** in the context menu.



The **SEG-Y SnapShot** window opens.

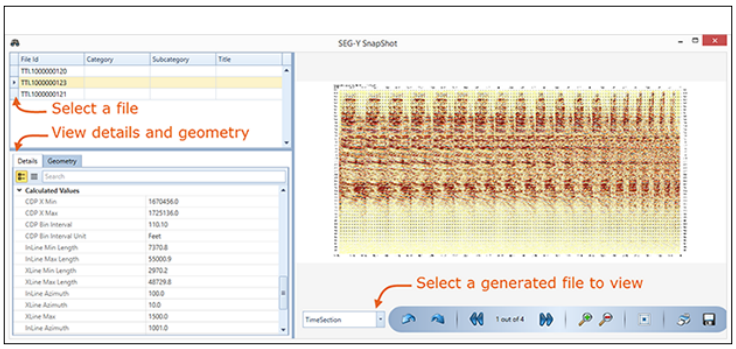
The grid in the upper left displays the files you selected for viewing. Click to select a file to view.

The lower left grid displays the **Details** tab and the **Geometry** tab. Click a tab to view the associated information.

The panel on the right displays the generated snapshot files:

- Time Slice
- Live Trace Outline
- Time Section
- EBCDIC
- Report

Click the drop-down to select a snapshot view. Use the navigation bar to browse, print or save the files.



Export SEG-Y as Shape

You can export SEG-Y files as a shape file. You can select multiple file IDs and then from the context menu select **Export SEGY navigation to shape file**.

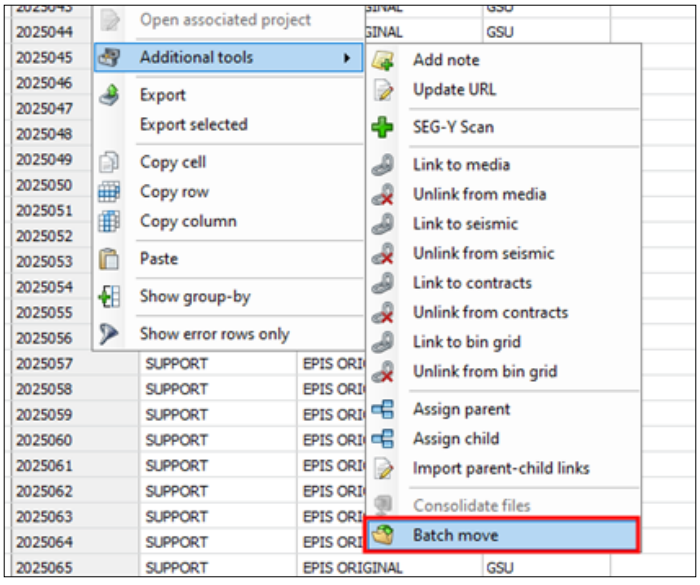
Moving files

In the **Files** module, use the **Batch Move** tool to manage the movement of your existing files and the location of copied files.

New in this version:

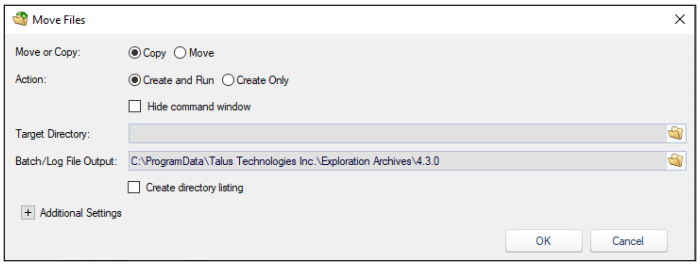
- The target file name will default to **Current File Name**.
- Now allows a folder structure with **SeismicName_SeismicID**.
- You can now create a directory listing as part of the copy process.

1. Click to select the files to be moved.
2. Right-click to open the context menu and select **Additional Tools>Batch Move**.

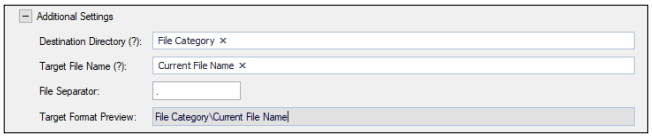


The **Move Files** window opens.

3. Set the following criteria:



- **Move or Copy**: Select **Copy** to copy the files, or **Move** files to a new location.
- **Action**: Select **Create and Run** or **Create Only**.
- **Hide command window**: Select this checkbox to hide the command window.
- **Target Directory**: Browse to and select the appropriate production location.
- **Batch/Log File Output**: Browse to and select the appropriate output location.
- **Create directory listing**: If selected, a "Directory Listing" field will appear, and you will be required to specify a location for the directory listing file to be saved.
- **Additional Settings**: Using the Additional Settings section, you can build a more dynamic destination file format.



The properties are listed as **tokens** that can be appended to, removed, or reordered. The tokens can be reordered by dragging them to the desired location.

Destination Directory: Type to find or create tokens that help create the directory path.

Target File Name: Type to find or create tokens that help create the directory path.

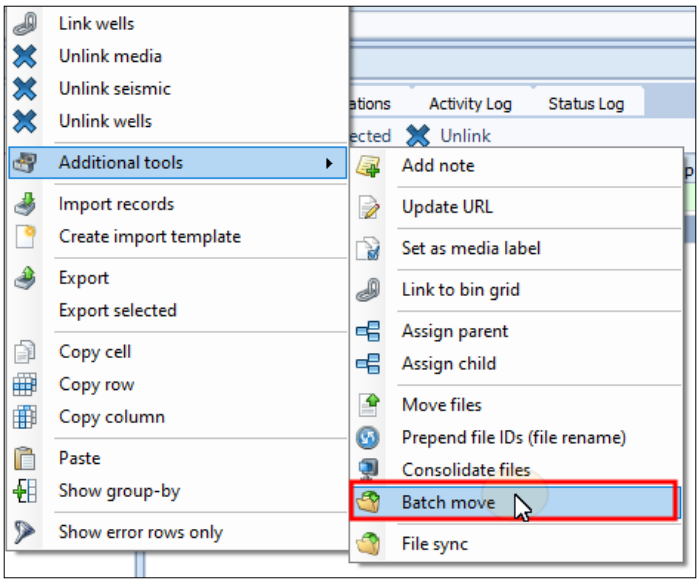
File Separator: Select the character that will separate the various tokens used in the file name.

Target Format Preview: Displays the final output format presuming each token has a valid valued.

4. Click **OK**. The files move to the specified folder.
5. Open the originating folder (or staging folder) to verify that the files moved correctly.

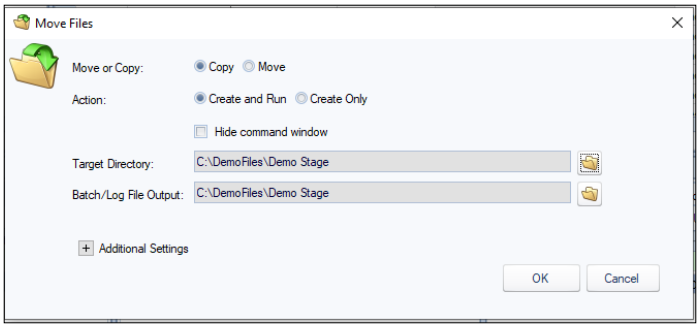
In the **Files** module, use the **Batch Move** tool to manage the movement of your existing files and the location of copied files.

1. Click to select the files to be moved.
2. Right-click to open the context menu and select **Additional Tools>Batch Move**.

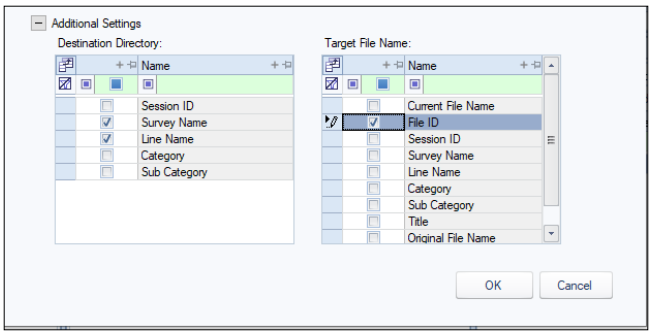


The **Move Files** window opens.

3. Set the following criteria:



- **Move or Copy**: Select **Copy** to copy the files, or **Move** files to a new location.
- **Action**: Select **Create and Run** or **Create Only**.
- **Hide command window**: Select this checkbox to hide the command window.
- **Target Directory**: Browse to and select the appropriate production location.
- **Batch/Log File Output**: Browse to and select the appropriate output location.
- **Create directory listing**: If selected, a "Directory Listing" field will appear, and you will be required to specify a location for the directory listing file to be saved.
- **Additional Settings**: Using the Additional Settings section, you can build a more dynamic destination file format.



The properties are listed as **tokens** that can be appended to, removed, or reordered. The tokens can be reordered by dragging them to the desired location.

Destination Directory: Type to find or create tokens that help create the directory path.

Target File Name: Type to find or create tokens that help create the directory path.

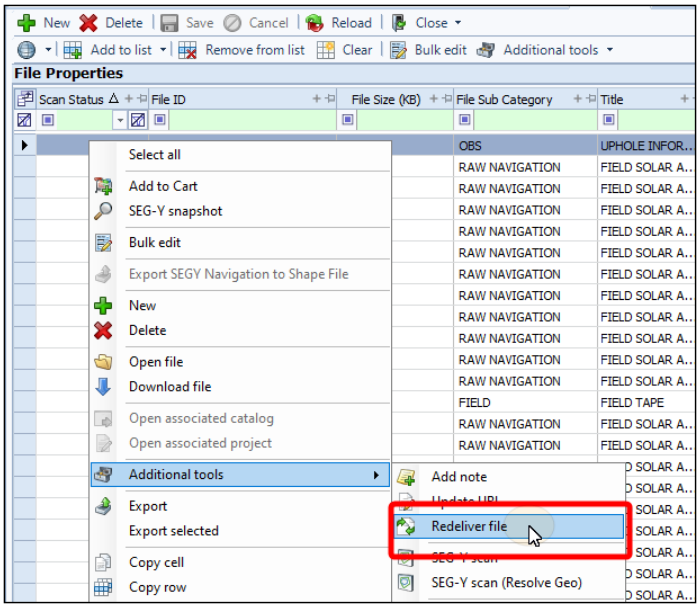
4. Click **OK**. The files move to the specified folder.
5. Open the originating folder (or staging folder) to verify that the files moved correctly.

Redeliver File

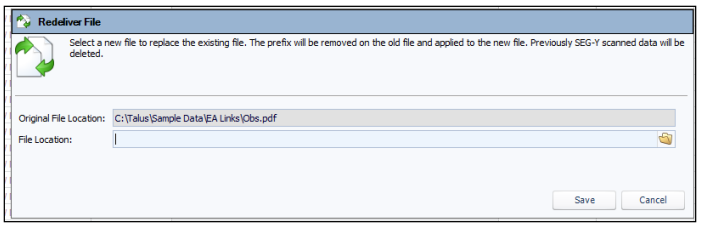
You can redeliver files to have their file location and size updated by another selected file. The File prefixes will be removed from the old file and re-applied to the new file.

To redeliver a file:

1. In the files properties grid, right click and select **Additional Tools>Redeliver file** from the context menu.



2. The **Redeliver File** dialogue panel opens.



3. Enter the path to file that is replacing the current file. You can also click the file open button and navigate to the file location.
4. Click **Save**. The operation will be completed.

Once complete, a log entry will be recorded in the FILE_REDELIVERY_LOG containing details of the original file and new file.



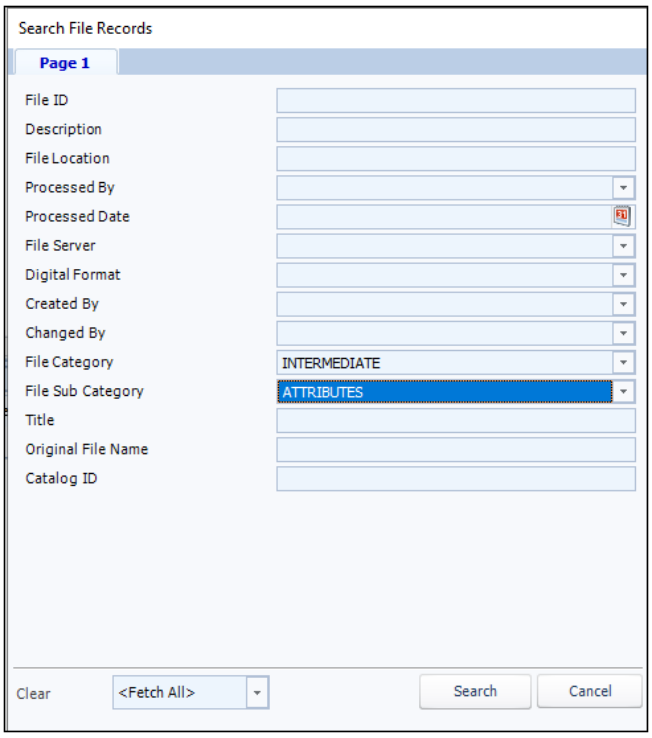
3.4 Contracts

The **Contract** module is available for managing, editing and viewing details of contract-related documentation.

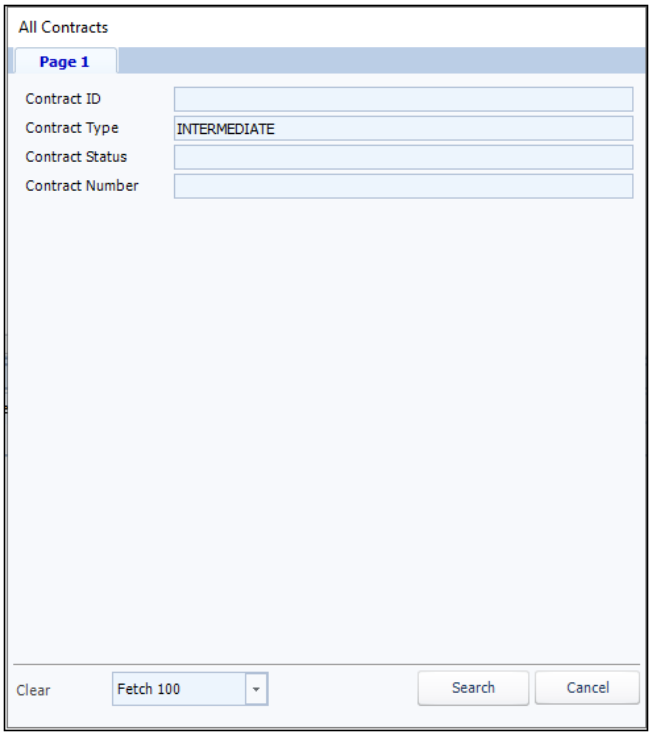
For a fluid workflow, contracts link to the Data Request process, business associates, media, seismic and files.

To open items in the **Contract** module:

1. Click **search** next to **Contract** in the Navigation panel. There are 2 types of searches available:
   - **Contract Search**: Allows you to configure search fields and fetch a specified number of records to add or populate the Contract Properties Grid.



» **All Contracts**: Lets you search by Contract ID, Contract Type, Contract Status, or Contract Number.



2. Enter your filter values and click **Search**. The results open in the **Contract** module.

The **Contract Properties** grid displays the information for each item.

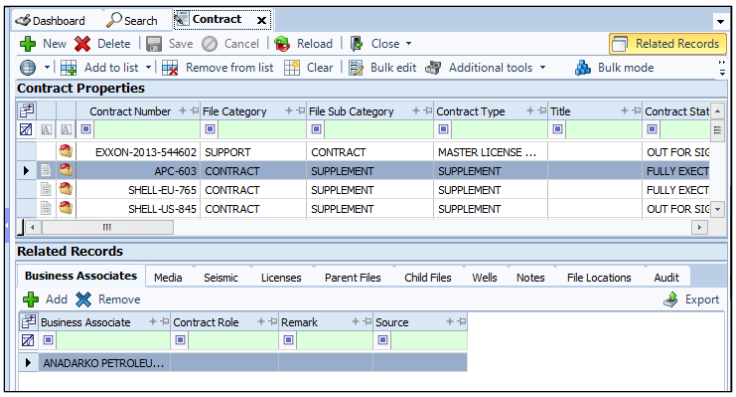
New in this version:

This release, we have added new attributes to the Contract Properties grid:

- Commercial Type
- Derivation Owner Type
- Export Grant Effective/Termination Dates
- Expiry Retention Type/Duration

To view the **Related Records** for an item, click on a row in the **Contract Properties** grid and the associated details display in the **Related Records** tabs.

To view the **Related Records** for multiple items, turn on **Bulk Mode**, select multiple items in the **Contract Properties** grid and the associated information for all selected items display in the **Related Records** tabs.

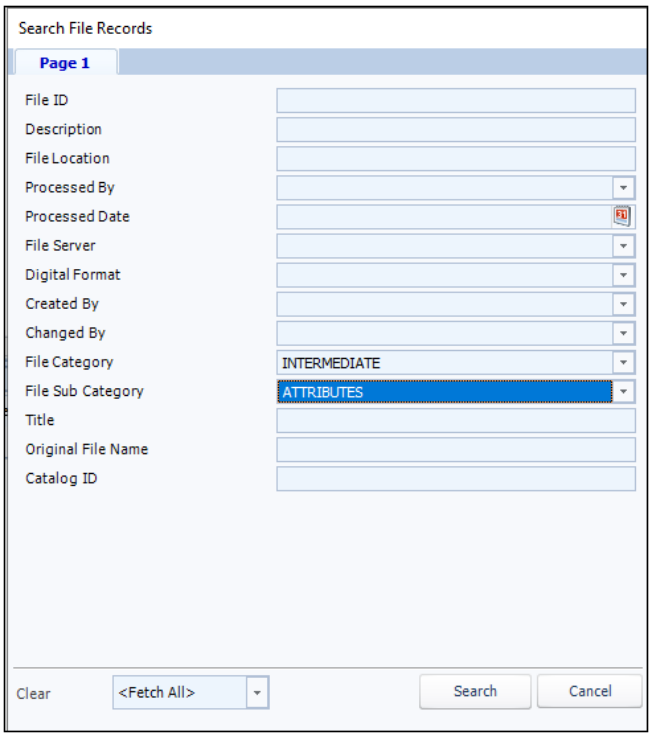


The **Contract** module is available for managing, editing and viewing details of contract-related documentation.

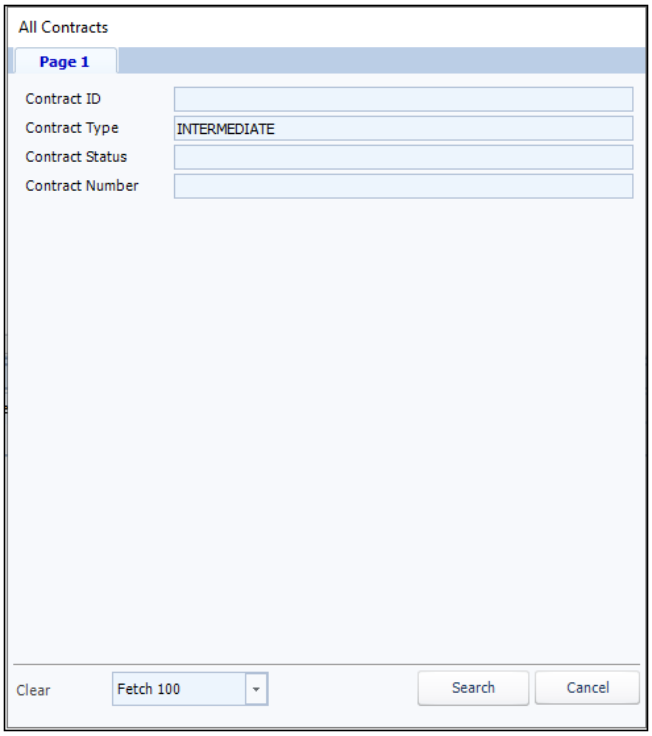
For a fluid workflow, contracts link to the Data Request process, business associates, media, seismic and files.

To open items in the **Contract** module:

1. Click **search** next to **Contract** in the Navigation panel. There are 2 types of searches available:
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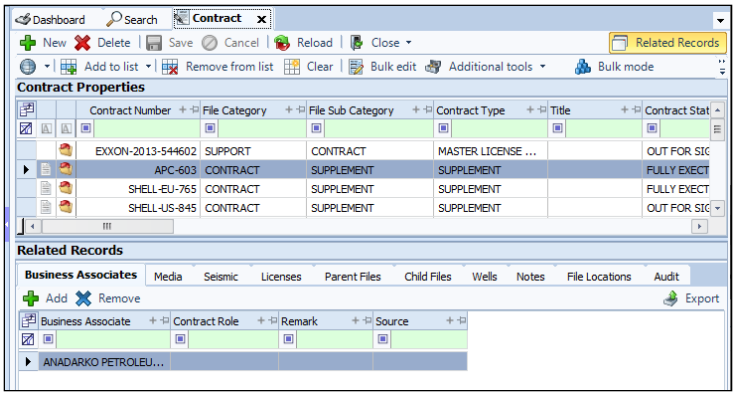
» **All Contracts**: Lets you search by Contract ID, Contract Type, Contract Status, or Contract Number.



2. Enter your filter values and click **Search**.

The results open in the **Contract** module. The **Contract Properties** grid displays the information for each item. To view the **Related Records** for an item, click on a row in the **Contract Properties** grid and the associated details display in the **Related Records** tabs.

To view the **Related Records** for multiple items, turn on **Bulk Mode**, select multiple items in the **Contract Properties** grid and the associated information for all selected items display in the **Related Records** tabs.



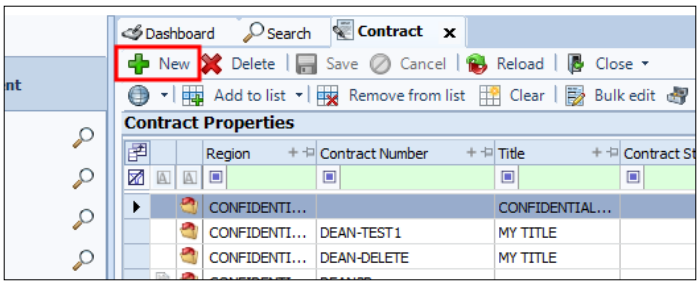
Add a contract

Depending on your company workflow, contract files can be added from the **Project Tracker** module or from the **Contract** module.

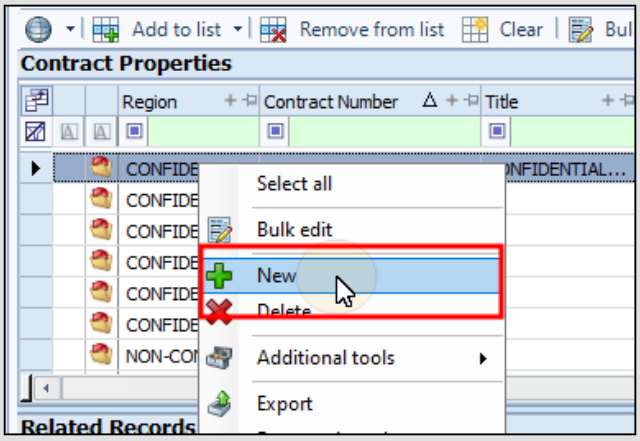
> **Note:**
> Before adding the contract, you must have at least one seismic record ready to link to the contract.

To add a new contract in the Contract Module:

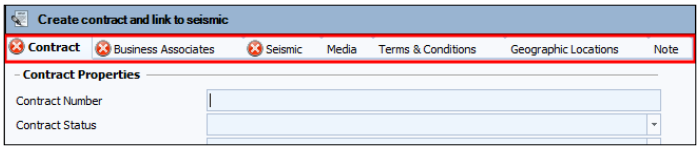
1. In the toolbar, click **New**.



Tip:
Alternatively, you can right-click a row in the Contact Properties grid to open the context menu then click **New**.



2. The **Create contract and link to seismic** window opens with several tabs available for entering associated information.



Each tab has a specific function

- **Contract**: you enter the Information about the contract. Mandatory fields are Highlighted with an X. The Contract tab is required to be filled out before you save.
- **Business Associates**: See: "Assign or add a business associate" on page 213
- **Seismic**: See: "Linking seismic to a new contract" on page 214
- **Media**: See: "Add the contract media " on page 224
- **Terms and Conditions**: This tab allows you to attach Terms and Conditions to the contract. See: "Add Terms and Conditions" on page 220
- **Geographic Locations**: You can add different Geographic Locations . See: "Add Geographic Locations" on page 222
- **Note**:See: "Add a note with a contract" on page 224

3. Once you complete the form, click **Save**. The window will close and the new contract will be added to the grid.

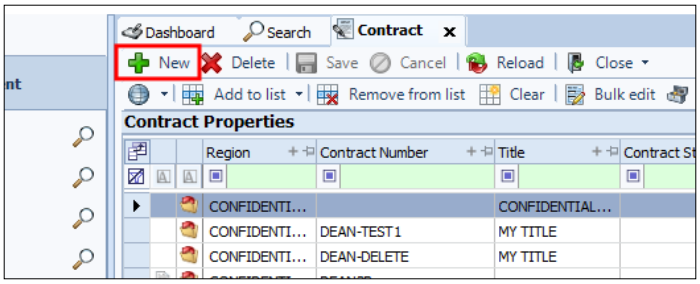
Note:
A Contract ID will be generated for the new contract. An administrator can configure the Contract ID to have a custom prefix added to it.

Depending on your company workflow, contract files can be added from the **Project Tracker** module or from the **Contract** module.

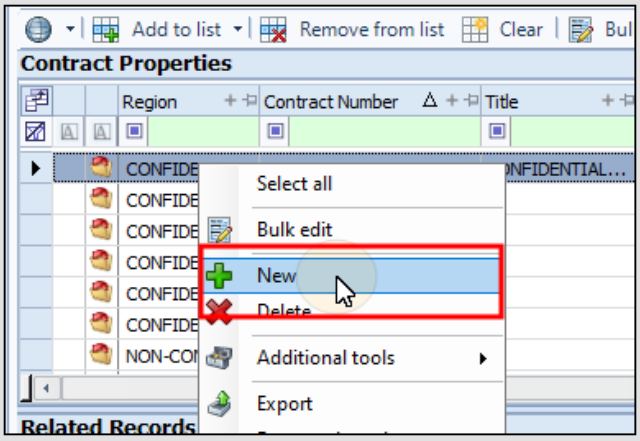
> **Note:**
> Before adding the contract, you must have at least one seismic record or Business Associate ready to link to the contract.

To add a new contract in the Contract Module:

1. In the toolbar, click **New**.



Tip:
Alternatively, you can right-click a row in the Contact Properties grid to open the context menu then click **New**.



2. The **Create contract** window opens with several tabs available for entering associated information.



Each tab has a specific function

- **Contract**: you enter the Information about the contract. Mandatory fields are Highlighted with an X. The Contract tab is required to be filled out before you save.
- **Business Associates**: See: "Assign or add a business associate" on the next page
- **Note**:See: "Add a note with a contract" on page 224
- **Media**: See: "Add the contract media " on page 224

Assign or add a business associate

When creating and "Add a contract" on page 209, Business Associates can be attached.

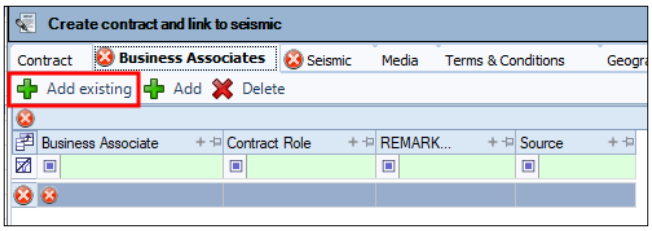
> **Note:**
> At least one Business Associate or Seismic Record is required when creating a contract.

There are 2 actions you can take when adding a Business Associate:

- **Add an existing Business Associate**

  To assign an existing Business Associate in the **Create contract and link to seismic** window:

  1. Click the **Business Associates** tab.
  2. Click **Add Existing**. An empty row appears in the grid.

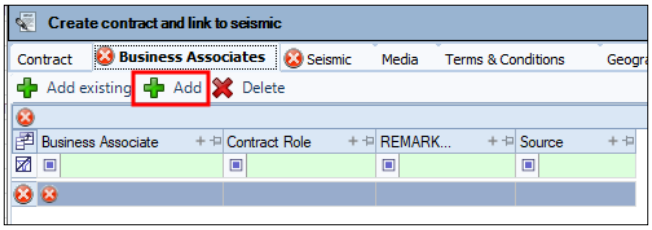


  3. In the **Business Associate** column, select the business associate from the drop-down.
  4. From the drop-select the **Contract Role**.
  5. Fill in any other information as needed.

- **Add a NEW Business Associate**

  To assign a new Business Associate in the **Create contract and link to seismic** window:

  1. Click the **Business Associates** tab.
  2. Click **Add**.



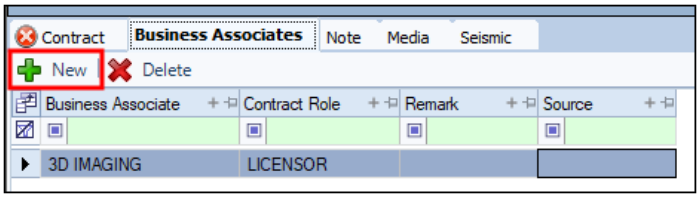
  3. In the Create Business Associate window, fill in the fields then click **Save**.

Once you have added a Business Associate, continue on to another tab in the **Create contract and link to seismic** window.

During the process of Adding a contract, you can assign a business associate to the contract.

To assign a business associate from the **Create contract and link to seismic** window:

1. Click the **Business Associates** tab.
2. Click **New**.



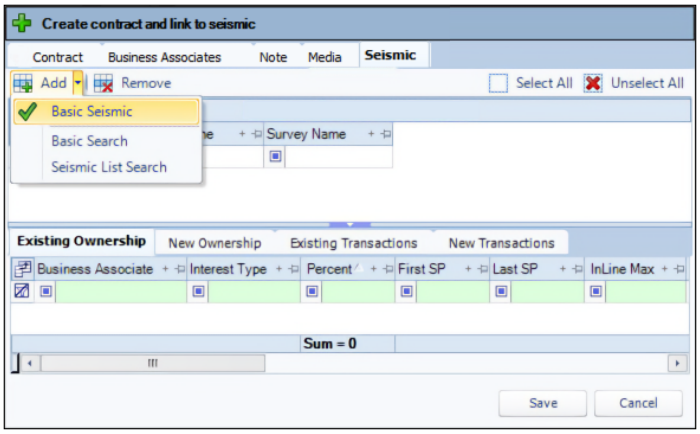
3. In the **Business Associate** column, select the business associate from the drop-down.
4. From the drop-select the **Contract Role**.
5. Enter a **Remark** and **Source**.
6. Continue to another tab.

Linking seismic to a new contract

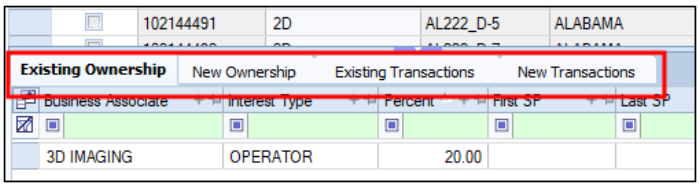
When you "Add a contract" on page 209, you must link at least one seismic record.

To link seismic to a contract:

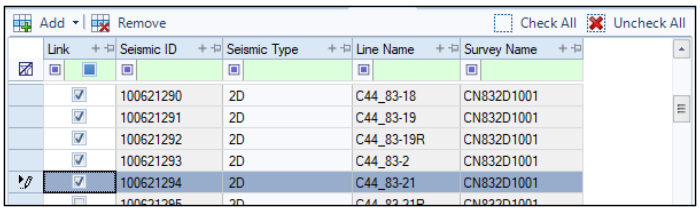
1. In the **Create contract and link to seismic** window, click the Seismic tab.
2. Click the down arrow next to **Add**, and select a search option.



3. In the search window, enter the search criteria and click **Search**. The results display in the upper panel with the associated detail.
4. View the results to identify the seismic to link. Use the lower tabs to view the ownership and transaction information.



5. In the **Link** column, check the seismic to link to the contract.



6. To add information under the **Business Associates**, **Notes** or **Media** tabs, click the associated tab and continue with the relevant steps.

   Or click **Save** and add the information later via the context menu.

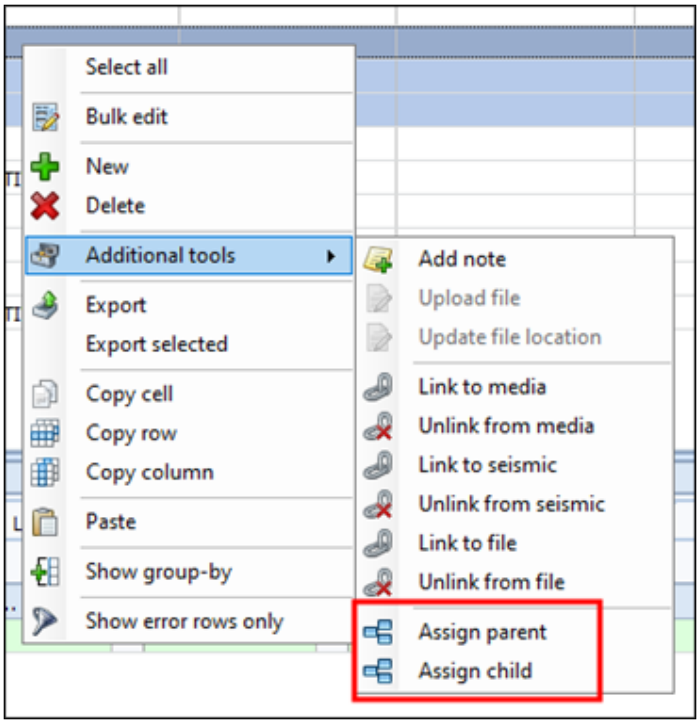
Assign a parent or child Contract

Select Version of EA Desktop:

The **Contract** module accommodates various project requirements with the ability to represent contract relationships. The relationship identifies a contract that is generated from another contract. The association between a parent and child contract is defined by your company workflow.

To assign a parent or child to one or more Contracts:

1. Select the target Contracts in the **Contract Properties** grid.
2. Right-click and select **Additional Tools>Assign Parent** or **Assign Child**.



3. In the new window, search for the Contract to assign as parent or child and click to select.
4. Click **Save**.

   The assigned parent or child contract displays in the associated tab of **Related Records**.

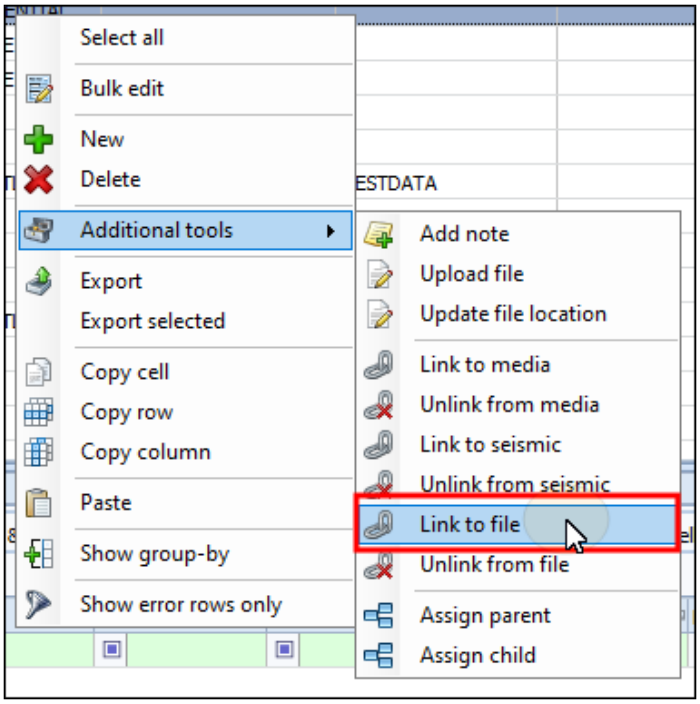

Sorry,
This feature is not
available in this version.

Link a File

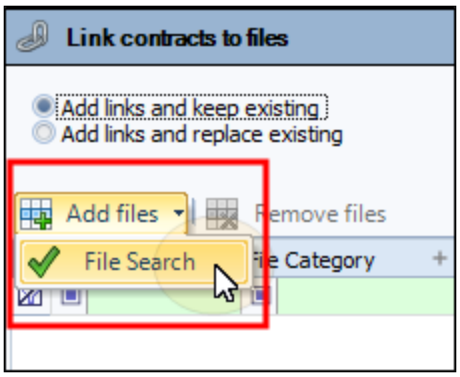
In the **Contract** module, use the **Contract Properties** grid to assign a parent file. When complete, the assigned files display in the **Files** tab of the **Related Records** panel.

To assign a File to one or more items:

1. Use one of the following methods to select the item(s) in the **Contract Properties** Panel:
   - Click to select a single row.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
   - To select multiple individual rows, press Ctrl while clicking to select.
2. Right-click on a selected row to open the context menu.
3. Select **Additional tools>Link to File**.

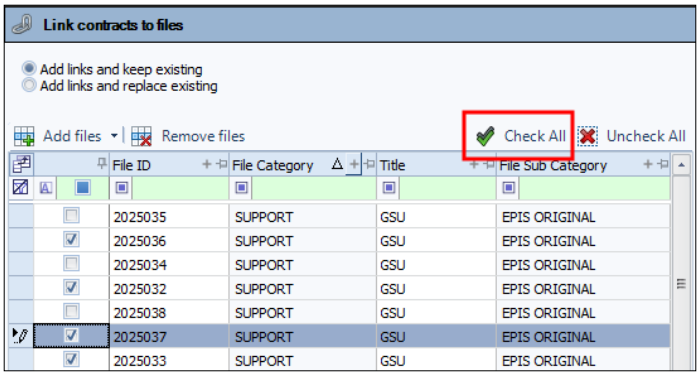


4. In the Link contracts to files window select File Search from the Add Files drop-down.



5. Enter your search criteria, then click **Search**. The results will populate the grid in the Link contracts to files window.
6. From the results, select the check box next to the files to be linked.

Tip:
You can also select **Check All** to select all the files in the grid.



7. Select the option to either add links and keep existing or to add links and replace existing for the selected files.
8. Click **Save**. The selected files will link and appear under the Files tab in the **Related Records** panel.



Add Terms and Conditions

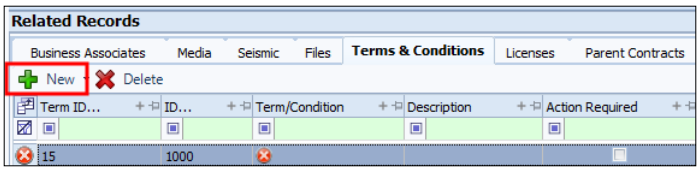
You can attach Terms and Conditions to a contract while it is being created, or to an existing contract from the related records tab.

Note:
No matter where you attach them, the procedure is the same.

To add Terms and Conditions to a contract you can use one of 2 methods

Enter Terms and Conditions Manually

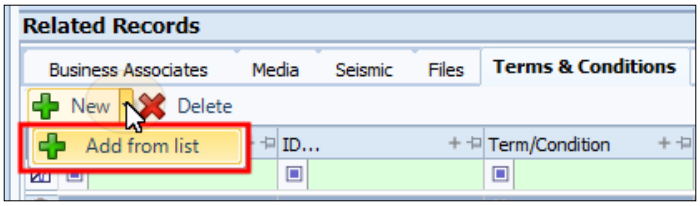
1. Select the **Terms and Conditions** tab, either in the Related Records panel or in the Create contract and link to seismic window.
2. Click **New**. A Blank row will appear in the Grid.



   The TermID and ID are automatically generated.
3. For the Term/Condition field you can:
   - Select a predefined Term from the drop-down OR
   - Manually Enter a Term if it isn't on the list.
4. If the Term requires an Action to be taken, select the checkbox, then you can select the user to assign the action to in the Action Assigned User column.
5. Fill in the other columns as required.
6. In the toolbar, click **Save**.

Select Terms from a list:

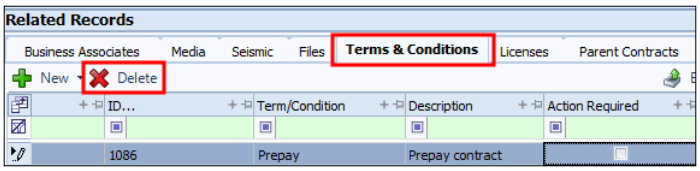
1. Select the **Terms and Conditions** tab, either in the Related Records panel or in the Create contract and link to seismic window.
2. Expand the New button and select **Add from list**.



   A window with a list of pre-defined terms opens.
3. You can select either a single term from the list by clicking on the row, or select multiple terms by pressing Ctrl and clicking on the row of each term.
4. Click **OK**
5. The grid will populate with the selected terms. You can make changes as needed.
6. In the toolbar, click **Save**.

To delete Terms from a contract:

1. Select the Terms from the grid.
2. Click **Delete**.



3. From the confirmation dialogue that appears, click **Yes**.



Add Geographic Locations

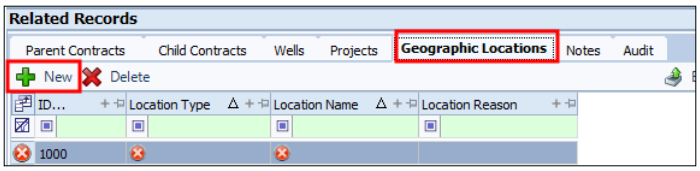
Select Version of EA Desktop:

Just as when you "Add Terms and Conditions" on page 220, you can attach the Geographic Locations to a contract while it is being created, or to an existing contract from the related records tab.

Note:
No matter where you attach them, the procedure is the same.

To add Geographic Locations to a contract:

1. Select the **Geographic Locations** tab, either in the Related Records panel or in the Create contract and link to seismic window.
2. Click **New**. A Blank row will appear in the Grid.

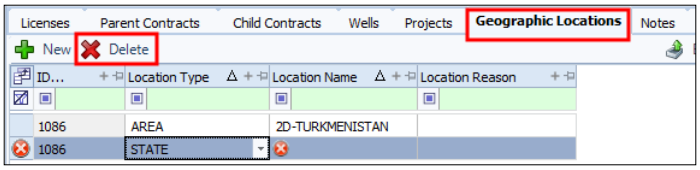


The ID is automatically generated.

3. There are 2 fields that are mandatory:
   - **Location Type**: Select the contents from this field from the drop-down list.
   - **Location Name**: Select from a drop-down list.
4. Fill in the other columns as required.
5. In the toolbar, click **Save**.

To delete a geographic location from a contract:

1. Select the Geographic Location or locations from the grid.
2. Click **Delete**.



3. From the confirmation dialogue that appears, click **Yes**.

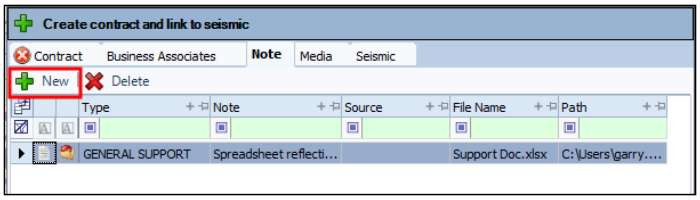


Add a note with a contract

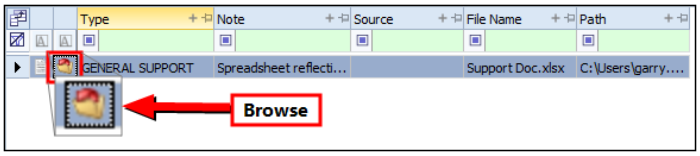
During the process of Adding a contract, you can add a note with the contract.

To add a note from the **Create contract and link to seismic** window:

1. Click the **Notes** tab.
2. Click **New**. A new row adds to the grid for you to enter details.



3. To attach a file as a note, click **Browse** and navigate to the file on your device.



4. Select the file and click **Open**. The **File Name** and **Path** generates in the grid.
5. Select the **Type**.
6. Double-click the field in the **Note** column to manually enter a description.
7. Continue to another tab.

Add the contract media

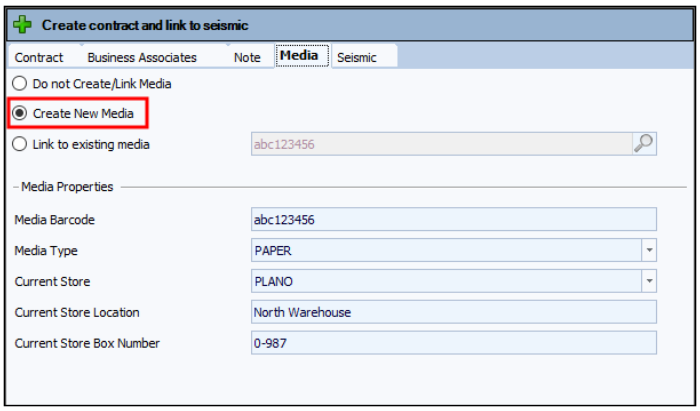
When Adding a contract, you can link the physical contract, with the location, to the record.

The **Media** tab of the **Create contract and link to Seismic** window offers the following actions for media:

- **Do not Create/Link Media**: add the contract without linking existing media or creating a new media.
- **Create New Media**: create new media that auto-links to the contract.
- **Link to Existing Media**: select existing media to link to the contract record.

To create and link to a new contract media...

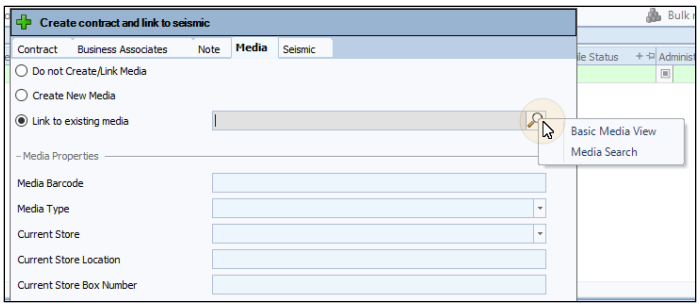
1. With the **Create contract and link to Seismic** window open, click the **Media** tab.
2. Select **Create New Media**.



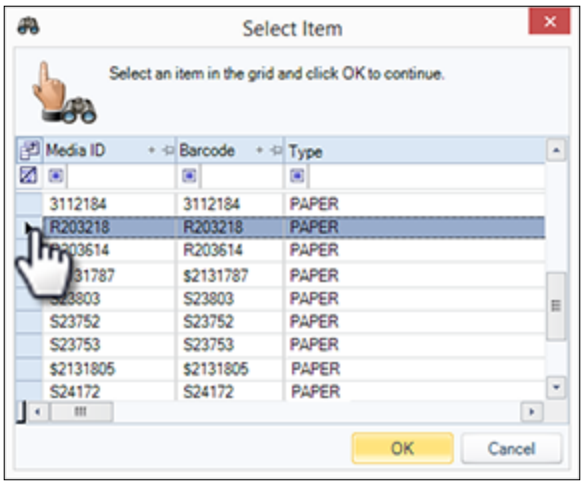
3. Scan the barcode from your media, or enter manually.
4. Select the **Media Type**, **Current Store**, **Current Store Location** and **Current Box Number**, as applicable.
5. If complete, click **Save**. Alternatively, continue with another tab.

To link to existing contract media...

1. With the **Create contract and link to seismic** window open, click the **Media** tab.
2. Select **Link to Existing Media**.
3. Click **search** and select whether to search with the **Basic Media View** or the **Media Search** option.



4. Enter your search criteria.
5. Click **Search**.
6. In the results window, select the target media and click **OK**.



The window closes and the media displays in the **Media Properties** of the **Create contract and link to seismic** window.

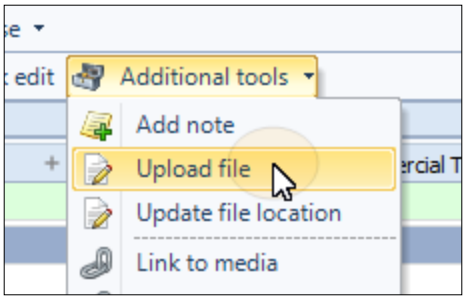
7. If complete, click **Save**. Alternatively, continue with another tab.

Upload a Contract file

If you have the correct permissions, you can upload a contract file to a selected Contract.

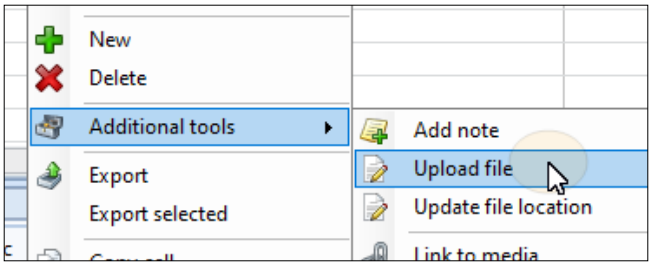
To update the File location of a contract:

1. Select a contract in the Contract Properties grid.
2. You can use one of the following methods to update the file location:
   - From the Toolbar, select **Additional Tools>Upload File**.



   - Right-click on a contract to open the context menu and select **Additional Tools>Upload**

File



3. In the file explorer dialogue navigate and select the file to upload..
4. Click **Open**



Update a contract File Location

If you have the correct permissions, you can update the File Location and File Server fields of a selected Contract.

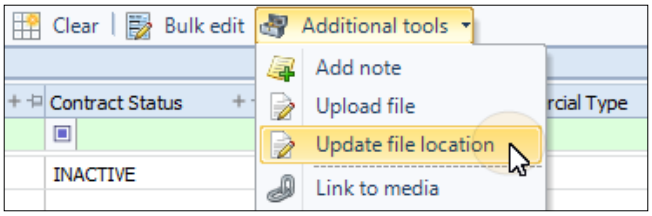
Warning:

- When you use this option it will remove the data of any contract file previously in existence.
- When you update the file location, the file will not be able to be previewed.

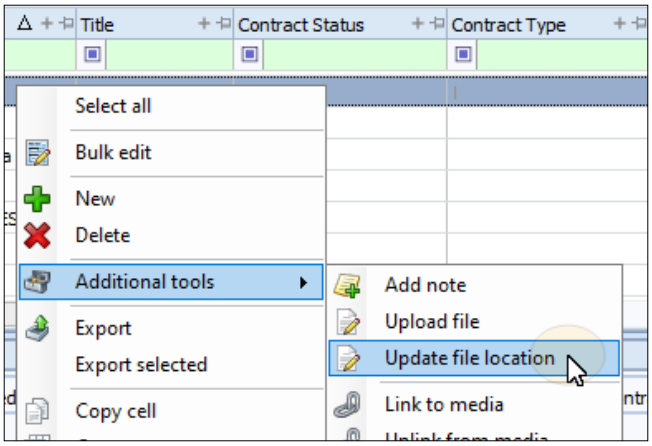
To update the File location of a contract:

1. Select a contract in the Contract Properties grid.
2. You can use one of the following methods to update the file location:

- From the Toolbar, select **Additional Tools>Update File Location**



- Right-click on a contract to open the context menu and select **Additional Tools>Update File Location**



3. In the Update File Contract Location dialogue, enter the new File Server and File Location fields.
4. Click **OK**

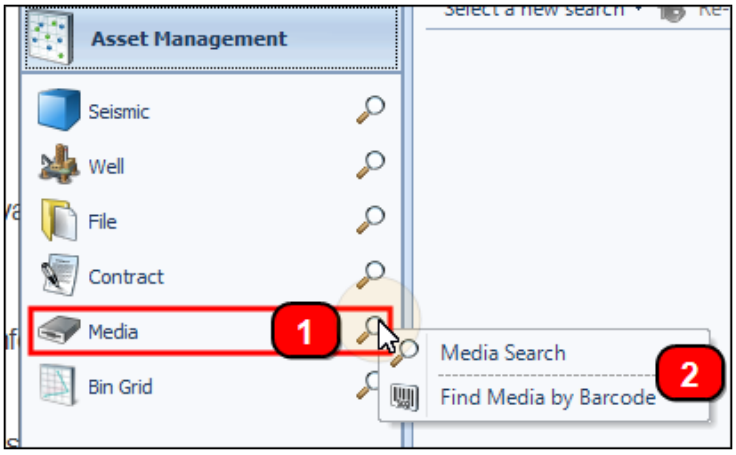


3.5 Media

New in this version:
Added a tool to create new media.

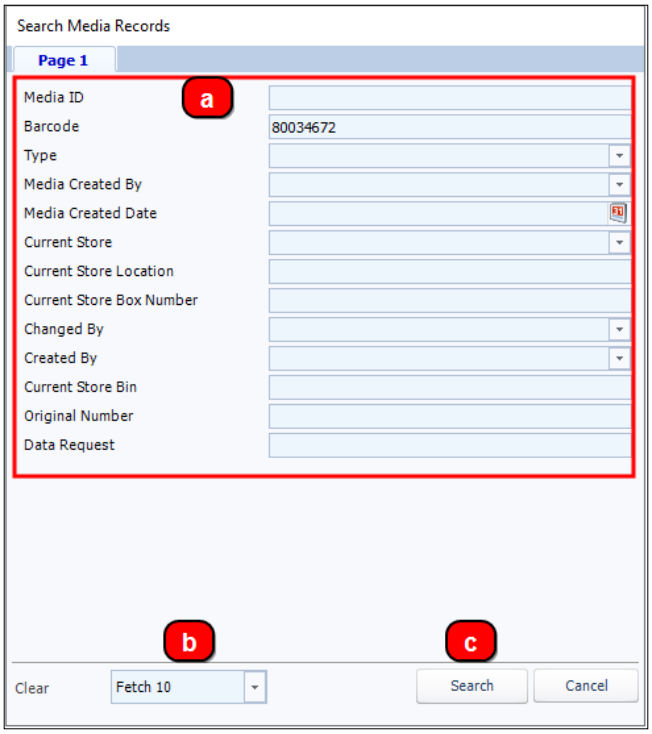
The **Media** module is available for you to view, edit and move data. The **Media** module offers several features and tools for updating the details of your file records.

To open items in the **Media** module:



1. Click **search** next to **Media** in the Navigation panel.
2. Select the appropriate search type and the search window will open.

- **Media Search**: The search window is divided into 3 areas:.

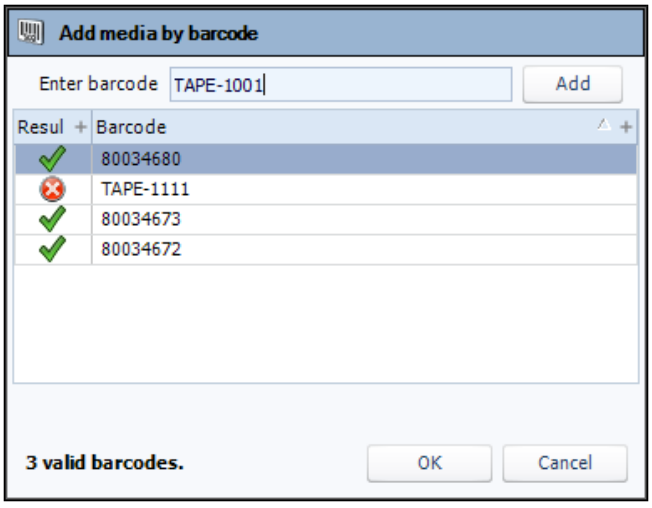


a. Enter your search filters in the fields listed.

b. Select the number of records to retrieve with the search conditions.

c. To display the search results in the Media Properties grid click **Submit**.

- **Find Media by Barcode**: This selection will open a window that lets you enter barcodes to compile a list of media to add to the grid.



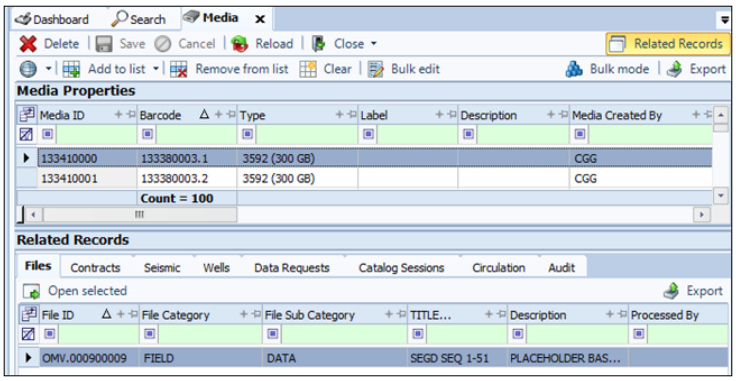
Enter the barcode in the field then click **Add**. The barcode will be validated and added to the list.

Click **OK**. The validated media will be added to the Media Properties grid.

The **Media Properties** grid displays the information for each item.

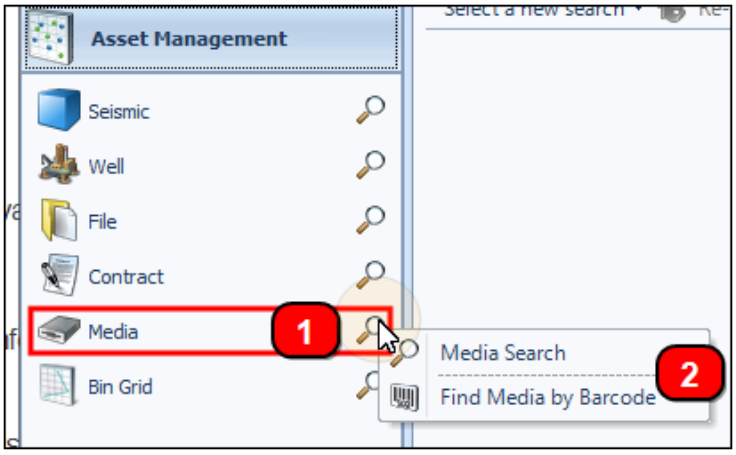
To view the **Related Records** for an item, click on a row in the grid and the associated details display in the **Related Records** tabs.

To view the **Related Records** for multiple items, turn on **Bulk Mode**, select multiple items in the **Media Properties** grid and the associated information for all selected items display in the **Related Records** tabs.



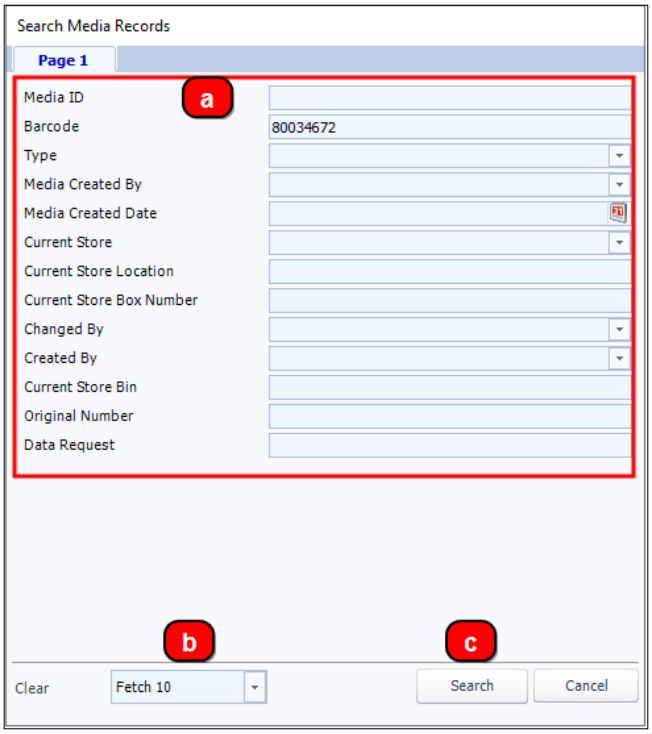
The **Media** module is available for you to view, edit and move data. The **Media** module offers several features and tools for updating the details of your file records.

To open items in the **Media** module:



1. Click **search** next to **Media** in the Navigation panel.
2. Select the appropriate search type and the search window will open.

- **Media Search**: The search window is divided into 3 areas:.

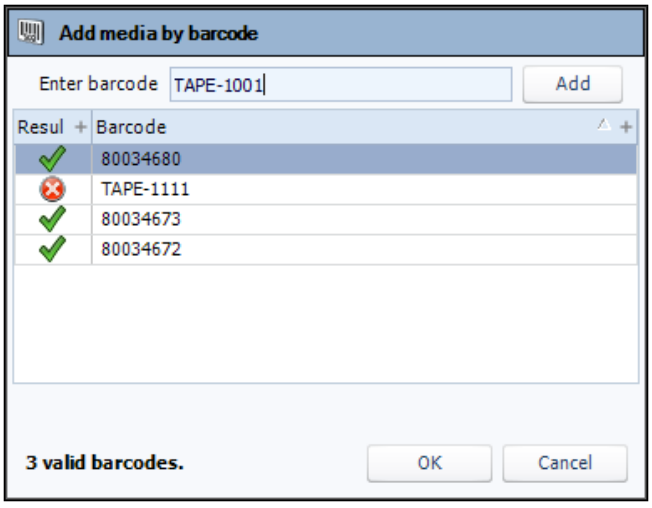


a. Enter your search filters in the fields listed.

b. Select the number of records to retrieve with the search conditions.

c. To display the search results in the Media Properties grid click **Submit**.

- **Find Media by Barcode**: This selection will open a window that lets you enter barcodes to compile a list of media to add to the grid.



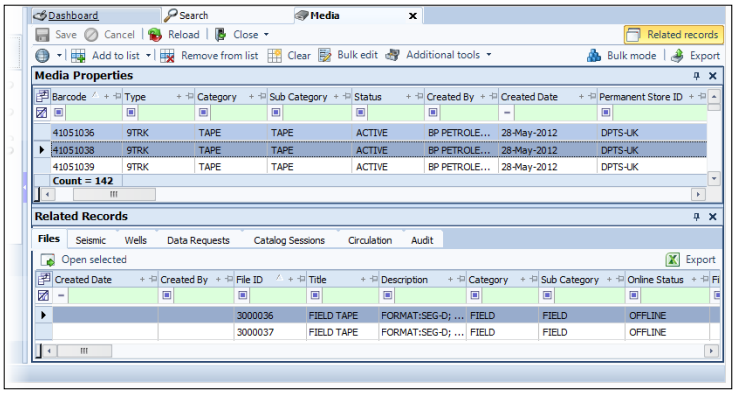
Enter the barcode in the field then click **Add**. The barcode will be validated and added to the list.

Click **OK**. The validated media will be added to the Media Properties grid.

The **Media Properties** grid displays the information for each item.

To view the **Related Records** for an item, click on a row in the grid and the associated details display in the **Related Records** tabs.

To view the **Related Records** for multiple items, turn on **Bulk Mode**, select multiple items in the **Media Properties** grid and the associated information for all selected items display in the **Related Records** tabs.

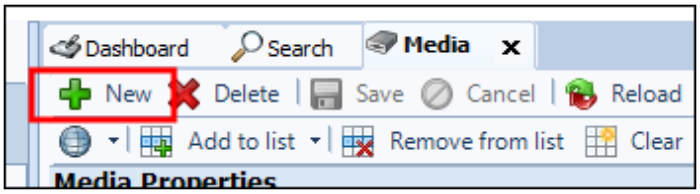


Create new media

The New Media tool allows you to create new Media records and link them to existing Files.

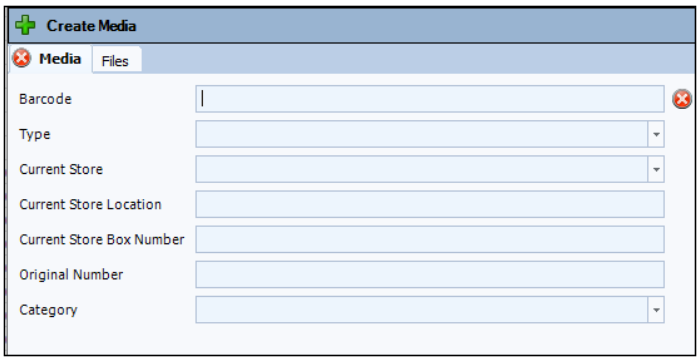
To create new media:

1. From the toolbar, click **New**.



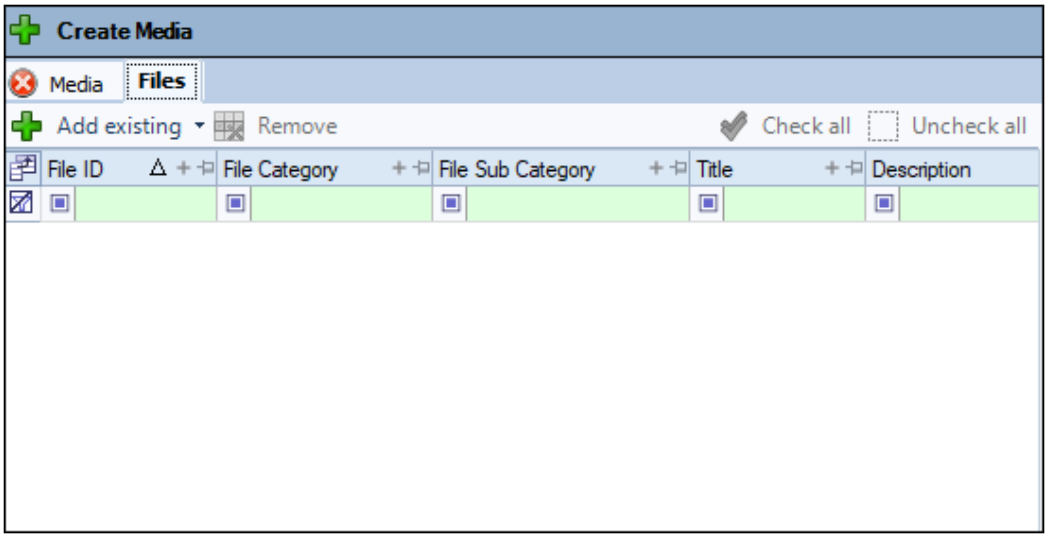
   The **Create Media** window opens.

2. The first tab displayed when opening the **New Media** tool allows setting various properties for the new Media.



Note:
The only required field is **Barcode**, which must be unique per region.

3. The **Files** tab allows the selection of existing File records to link to the Media record being created.



Note:
The File tab can only be viewed if you have the correct security access.

4. When you have created the new Media and linked files to it, click **Save**. The window will close and the media will be added to the grid.



Edit Media from the Properties grid

The **Media Properties** grid displays information for records. If you have been given the appropriate permissions you can edit information in a record.

To edit an individual record:

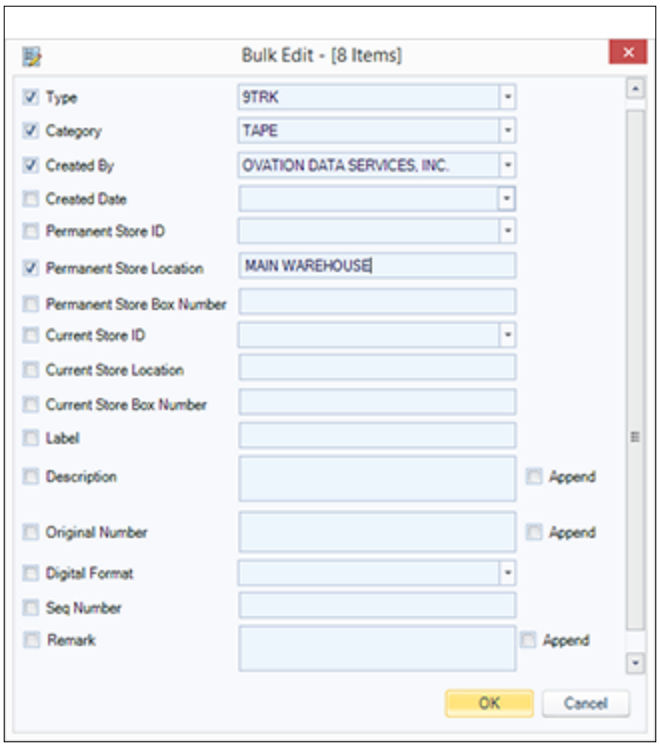
- Locate the item in the **Media Properties** grid and click in a cell of the category column.
- Depending on the data in the cell, you can manually type the information or select a property from drop-down menus.
- When finished editing a record, click **Save**.

To edit one or more details that are shared across multiple records, you can use **Bulk edit**.

1. Select the records to edit:
   - To select multiple **consecutive** rows, click and drag in the columns in the grid.
   - To select multiple **individual** rows, press **Ctrl**+click to select the row.
2. After selecting the rows, click **Bulk edit** in the toolbar.

   Tip: You can right-click on the selected row and click **Bulk edit** in the context menu.

   The **Bulk edit** window opens.
3. Enter (or select via drop-down menus) the information for each field to be updated for selected rows.



Select the Append checkbox to add details to existing data in a field..

4. Click **OK** to complete the edits and close the window.
5. Click **Save** to apply the edits to the selected records.

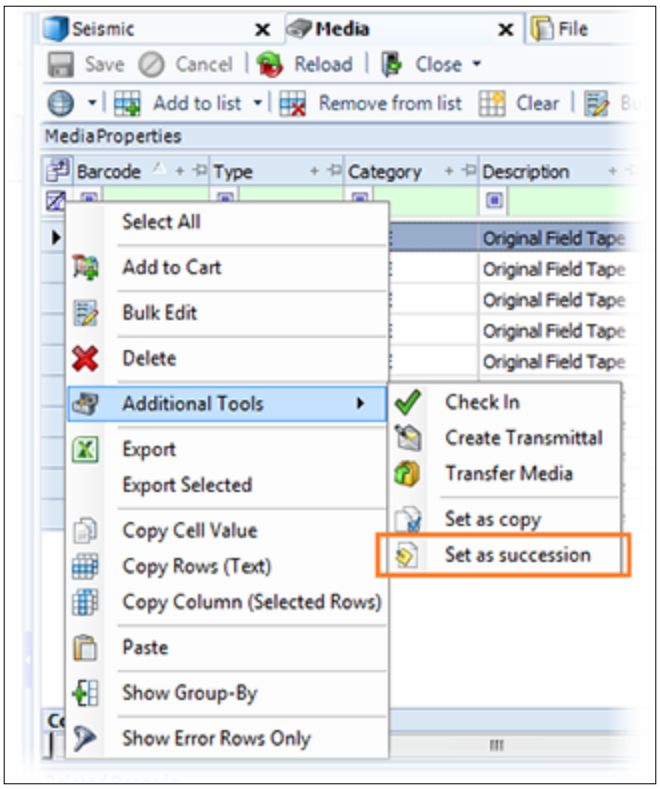
Set media as a succession

When media is remediated you can set the new media as a **succession** of the old media.

This allows you to track what media got replaced with what media.

To set a media as a succession of another media item:

1. In the **Media Properties** grid, select the item to be set as a succession.
2. Right-click to open the context menu. and select **Additional Tools**>**Set as succession**.



3. Search for the original media to assign and select.



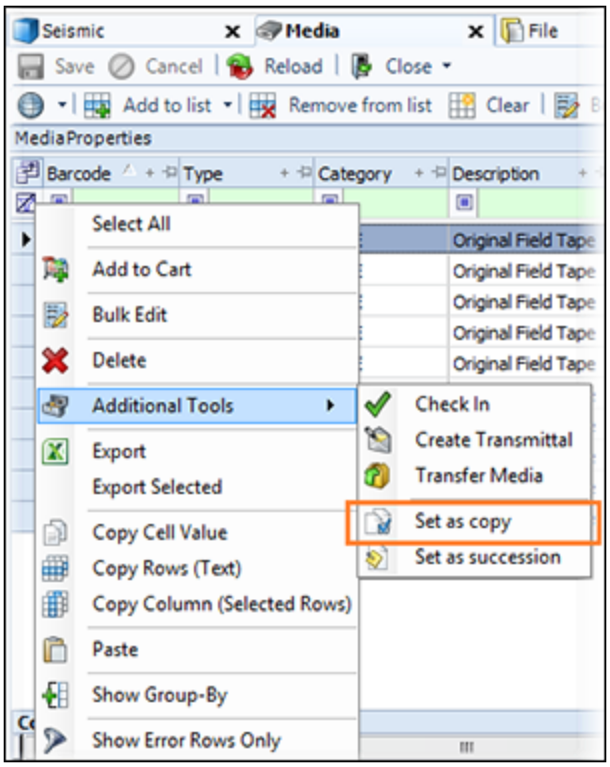
4. Click **Save**.

Set a media as a copy

If a media item in the **Media** module is a copy of another media, you can set the media as a copy by linking the original media.

To set a media as a copy of another media item:

1. In the **Media Properties** grid, select the item to be set as a copy.
2. Right-click on the item to open the context menu.
3. Point to **Bulk Tools** and select **Set as copy**.



4. The **Set as copy** window opens.
5. In The **Set as copy** window search for the original media to assign.



6. Click **Save**.

3.6 Bin Grids

New in this version:

» The inline/xline fields are now displaying to two decimal places of precision on the 'Calculate x/y or inline/xline' tool.

Create, edit and manage bin grids using the **Bin Grid** module.

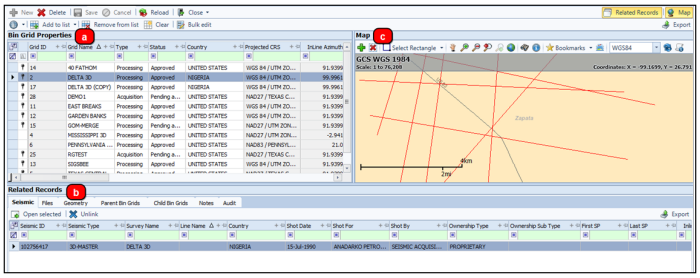
The **Bin Grid** module is your interface for defining bin grids for acquisition or processing projects. The bin grids you create become available for linking to your

seismic and associated SEG-Y files. You can also use the bin grid as a load sheet for loading data to a workstation.

To open items in the **Bin Grid** module:

1. Click **search** next to **Bin Grid** in the Navigation panel.
2. Select either **Bin Grid Search** or **Basic Bin Grid Search** from the menu.
3. Enter your filter values in the search window then click **Search**.

   The results open in the **Bin Grid** module. The Work Area is divided into 3 Panels



a. **Bin Grid Properties**: displays details about the Bin Grid

b. **Related Records**: To view additional details for a Bin Grid, click on a row in the **Bin Grid Properties** and the associated details displaying the tabs.

c. **Map**: To display the geographical location of a bin grid, click the Pin Icon at the head of an item from the **Bin Grid Properties** grid.

   The map will zoom to the bin grid location.

   To display the properties of a bin grid that is on the map, use a selection tool and add the bin grid to the **Bin Grid Properties** grid.

> **Tip:**
> When creating a new bin grid, the map is an effective tool for checking that positioning information is accurate and that the bin grid is located correctly.

Create, edit and manage bin grids using the **Bin Grid** module.

The **Bin Grid** module is your interface for defining bin grids for acquisition or processing projects. The bin grids you create become available for linking to your seismic and associated SEG-Y files. You can also use the bin grid as a load sheet for loading data to a workstation.

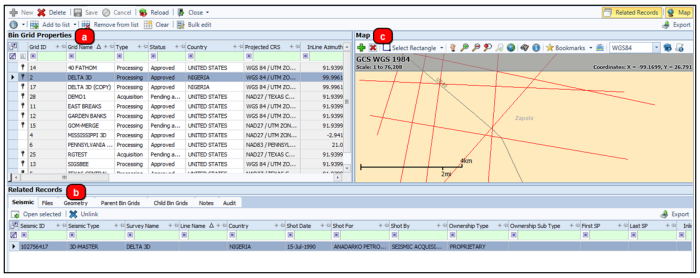
New in this version:

- Added an Audit tab to the Bin Grid Related Records.
- Added a new security tag for Bin Grid creation instead of having the Bin Grid edit security tag work for both create and edit.

To open items in the **Bin Grid** module:

1. Click **search** next to **Bin Grid** in the Navigation panel.
2. Select either **Bin Grid Search** or **Basic Bin Grid Search** from the menu.
3. Enter your filter values in the search window then click **Search**.

   The results open in the **Bin Grid** module. The Work Area is divided into 3 Panels



a. **Bin Grid Properties**: displays details about the Bin Grid

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c. **Map**: To display the geographical location of a bin grid, click the Pin Icon at the head of an item from the **Bin Grid Properties** grid.

   The map will zoom to the bin grid location.

   To display the properties of a bin grid that is on the map, use a selection tool and add the bin grid to the **Bin Grid Properties** grid.

> **Tip:**
> When creating a new bin grid, the map is an effective tool for checking that positioning information is accurate and that the bin grid is located correctly.

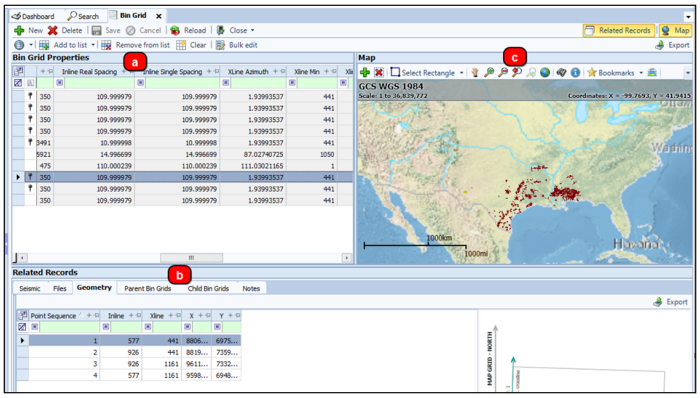
Create, edit and manage bin grids using the **Bin Grid** module.

The **Bin Grid** module is your interface for defining bin grids for acquisition or processing projects. The bin grids you create become available for linking to your seismic and associated SEG-Y files. You can also use the bin grid as a load sheet for loading data to a workstation.

To open items in the **Bin Grid** module:

1. Click **search** next to **Bin Grid** in the Navigation panel.
2. Select either **Bin Grid Search** or **Basic Bin Grid Search** from the menu.
3. Enter your filter values in the search window then click **Search**.

   The results open in the **Bin Grid** module. The Work Area is divided into 3 Panels



a. **Bin Grid Properties**: displays details about the Bin Grid
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   The map will zoom to the bin grid location.

   To display the properties of a bin grid that is on the map, use a selection tool and add the bin grid to the **Bin Grid Properties** grid.

> **Tip:**
> When creating a new bin grid, the map is an effective tool for checking that positioning information is accurate and that the bin grid is located correctly.

Create a new bin grid

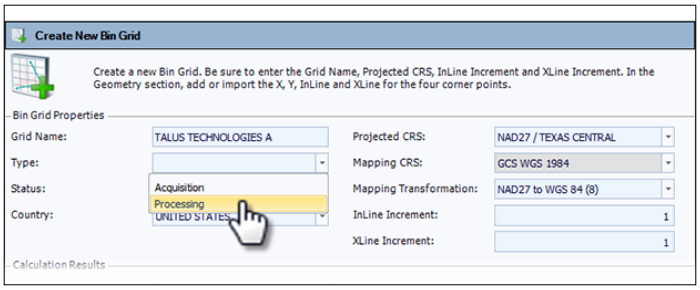
To create a new bin grid, click **New** in the workspace toolbar. The **Create New Bin Grid** window opens and displays three sections:

- The **Bin Grid Properties** provides fields for specifying the bin grid and navigation properties.
- The **Calculation Results** section populates the calculations according to your geometry related entries.
- The **Geometry** section is for you to manually enter or import the geometry points.

To define your bin grid:

6. In the **Bin Grid Properties** section, enter a **Grid Name**.

   Select the **Type**, **Status** and **Country**.



7. Select the **Projected CRS** and the **Mapping Transformation**.

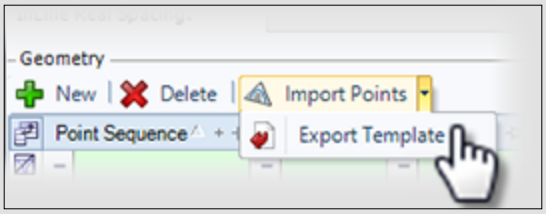
> **Note:**
> The **Mapping CRS** is defined by the map format and cannot be changed.

8. Enter values for your inline and crossline increments.

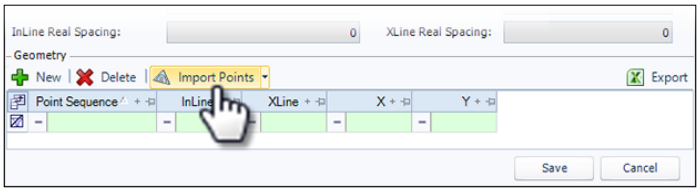
9. In the **Geometry** section, you can manually enter each point or import the points from Excel®.

» To manually enter points, click **New** in the **Geometry** section and enter each value.

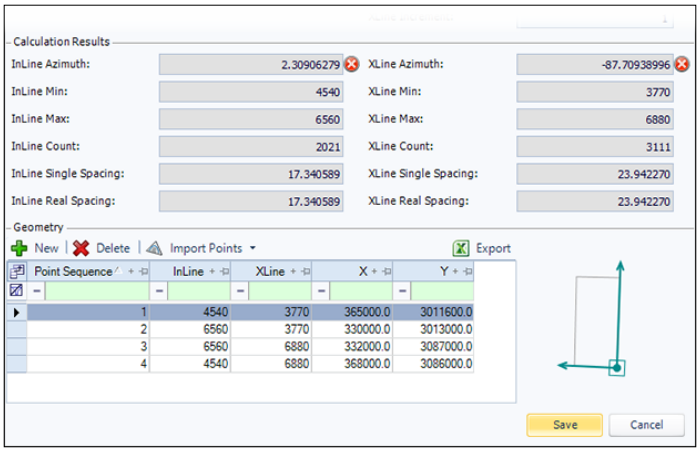
Tip:
To reduce the chance of introducing errors when entering points manually, it may make more sense to enter the data into an Excel template with the correct format for importing points. Click the down arrow next to **Import Points** and select **Export Template**.



10. To import points from an Excel® file, click **Import Points** and navigate to the location of your Excel file.



11. Select the file to import and click **Open**. The points import to the **Geometry** grid and a preview drawing of your bin grid displays.

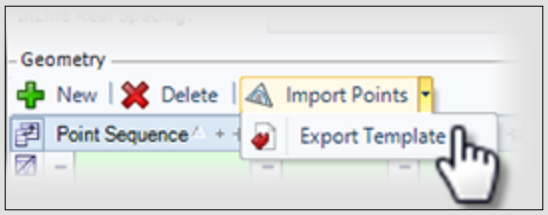


The **Calculation Results** section automatically updates and verifies the azimuth. A red x indicates that the azimuth calculation is beyond the allowable error threshold as set by your administrator.

You will not be able to save the bin grid unless you have security permission that allows you to ignore azimuth errors. To correct the error, edit the values in the grid or see your Geodesist.

12. If permissible, click **Save**.

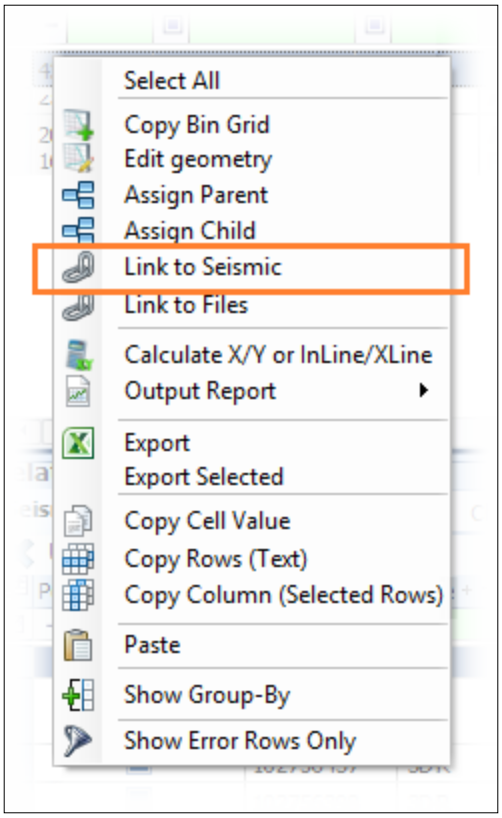
Tip:
To reduce the chance of introducing errors when entering points manually, it may make more sense to enter the data into an Excel template with the correct format for importing points. Click the down arrow next to **Import Points** and select **Export Template**.



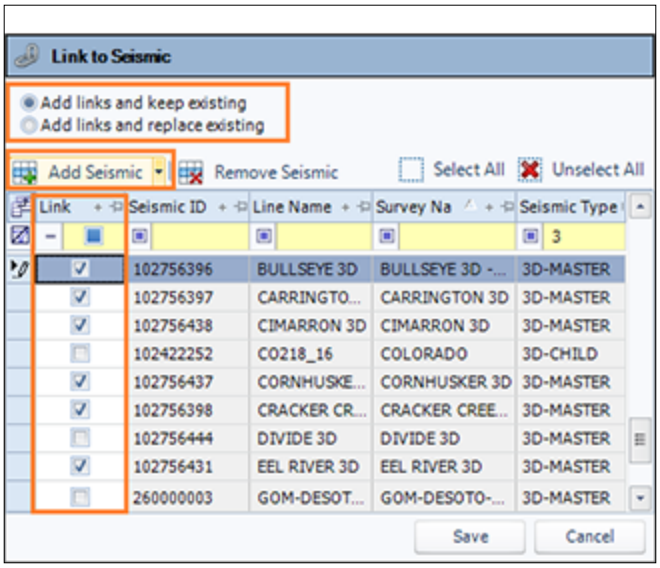
Link a bin grid to seismic

To link a bin grid to seismic:

1. From the **Bin Grid Properties** grid Click to select the bin grid.
2. Right-click and select **Link to Seismic**.

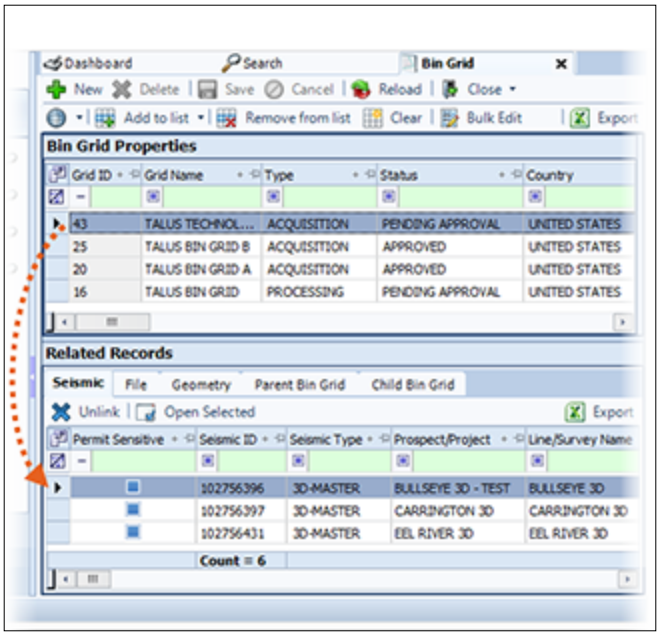


3. Select the option to either add links and keep existing or to add links and replace existing.
4. The seismic displayed in the grid is available for linking to the bin grid. To add seismic to the grid, click the down arrow next to **Add Seismic** and select a search.
5. Enter the search criteria and click **Search**. The results display in the grid in the **Link to Seismic** window.
6. In the **Link** column of the grid, select the seismic to link.



7. Click **Save**.

   The seismic links to the bin grid and displays in the **Seismic** tab of the **Related Records**.

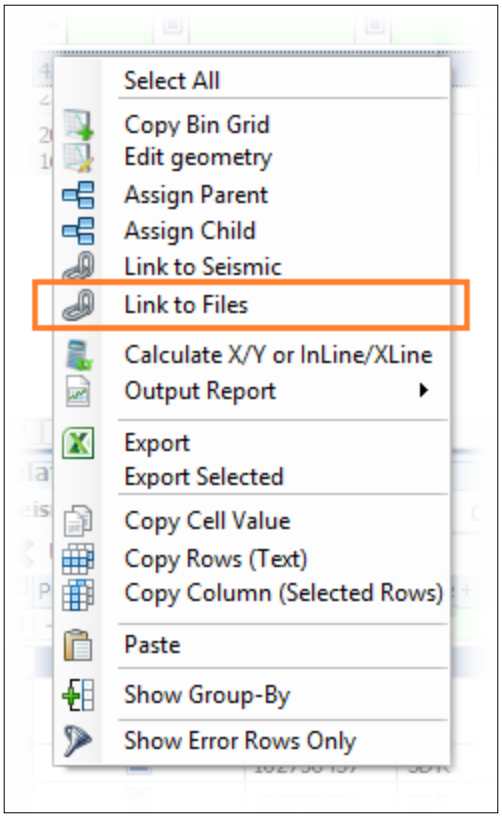


Link a bin grid to files

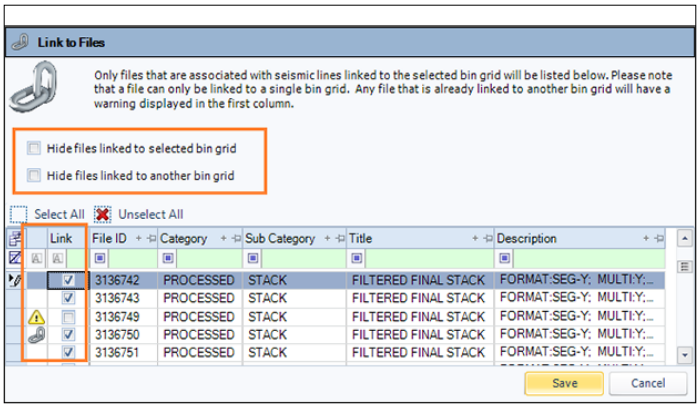
The seismic that is linked to a bin grid determines which files are available for linking to the bin grid. To create a link to a file, the file must be associated to seismic that is currently linked to the bin grid. To create seismic links refer to "Link a bin grid to seismic" on page 246.

To link a bin grid to files:

1. From the **Bin Grid Properties** grid Click to select the bin grid.
2. Right-click and select **Context menu**.



3. The files available for linking display in a grid in the new window.



   Since files can only be linked to a single bin grid, a warning  in the leader column indicates a file that has an existing link to another bin grid. If you create a new bin grid link to the file, the existing link will be removed.

   A link in the leader column indicates a file that is already linked to the selected bin grid.

   » To help filter the list of files, select the option to hide files linked to another bin grid or linked to the selected bin grid.

4. In the **Link** column, select the files to link.
5. Click **Save**.
   The files link to the bin grid and display in the **File** tab of the **Related Records**.

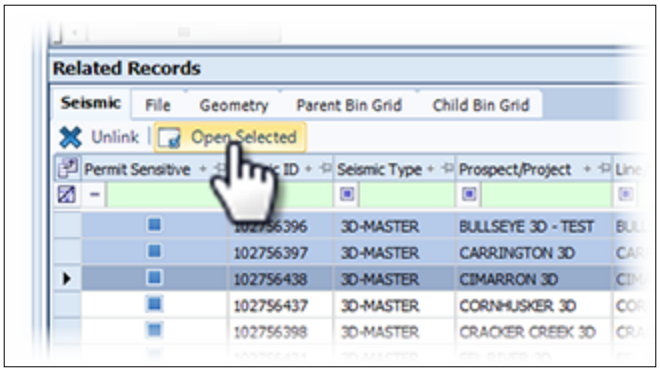
View linked seismic records and files

Any seismic and file records associated to a bin grid display in the **Related Records** tabs.

To view the extended detail of the files, open the record in the corresponding module.

To open the associated records in the **Seismic** or **File** module:

1. Click to select the bin grid in the **Bin Grid Properties** grid.
2. Click the **Seismic** or **File** tab in the **Related Records** to display the records.
3. Select the items in the grid to be opened.
4. Click **Open Selected** and the selected records open in the corresponding module.

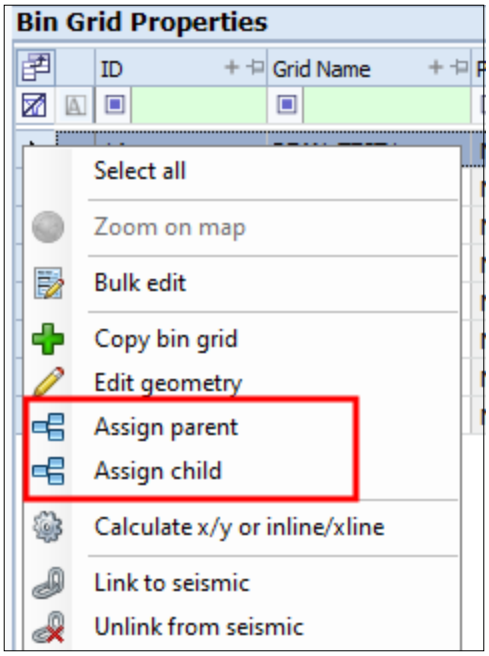


Assign a parent or child bin grid

The **Bin Grid** module accommodates various project requirements with the ability to represent bin grid relationships. The relationship identifies a bin grid that is generated from another bin grid. The association between a parent and child bin grid is defined by your company workflow.

To assign a parent or child to one or more bin grids:

1. Select the target bin grids in **Bin Grid Properties**.
2. Right-click and select **Assign Parent** or **Assign Child**.



3. In the new window, search for the bin grid to assign as parent or child and click to select.
4. Click **Save**.
   The assigned parent or child bin grid displays in the associated tab of **Related Records**.

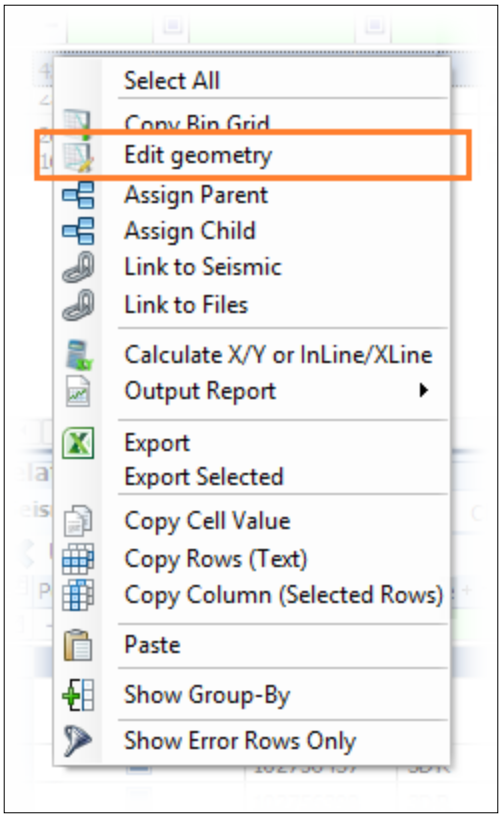
Edit an existing bin grid

The **Bin Grid** module presents the bin grid definitions in the **Bin Grid Properties** grid and the **Related Records** tabs. The information that affects the geometry calculations are uneditable in the grids.

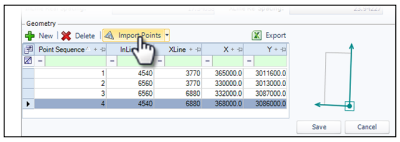
To edit geometry detail, and initiate new calculations, use the **Edit geometry** tool. Access to the tool requires a specific security setting for your profile. Contact your administrator to discuss changes for your security settings.

To edit the geometry of an existing bin grid:

1. From the **Bin Grid Properties** grid Click to select the bin grid.
2. Right-click and select **Edit Geometry**.



3. In the **Bin Grid Properties** section, make the appropriate changes.
4. In the **Geometry** section, you can manually edit the points or import the points from Excel®.
   - To edit points manually, double-click in a cell and modify the contents.
   - To import points, click **Import Points**.



Navigate to the location of your Excel file and click **Open**. The points import to the **Geometry** grid and a preview drawing of your new bin grid displays.

> **Note:**
> To avoid mistakes that may occur when entering points manually, you could export a template for an excel document and then import the revised data.

- Click **Save**.

> **Note:**
> The values in the **Bin Grid Properties** section and the **Geometry** section work together to perform the calculations and generate the bin grid output. When making changes, verify that your detail in both areas are correct.

Calculate custom values

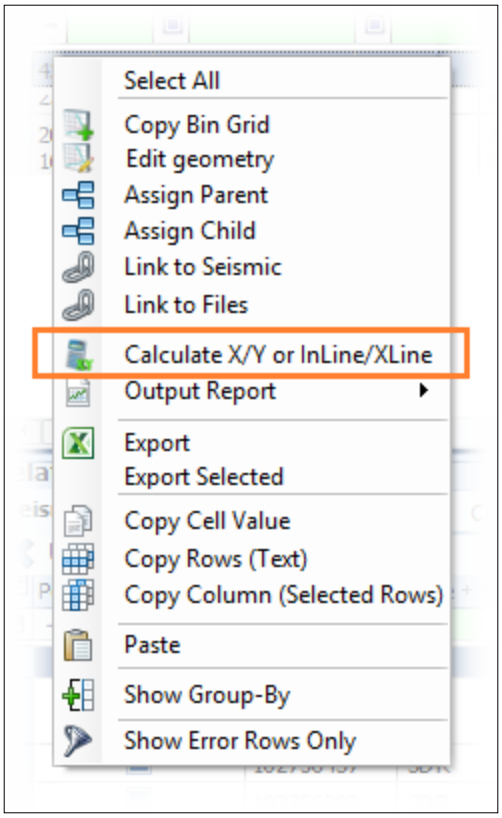
The **Bin Grid** module includes a tool for performing custom calculations associated to a bin grid.

The calculation tool performs two functions:

- **Entering the X and Y coordinates** will calculate the corresponding inline and crossline locations.
- **Entering the inline and crossline locations** will calculate the X and Y coordinates.

To calculate custom values with a bin grid:

1. From the **Bin Grid Properties** grid Click to select the bin grid.
2. Right-click and select **Calculate X/Y or InLine/XLine**.

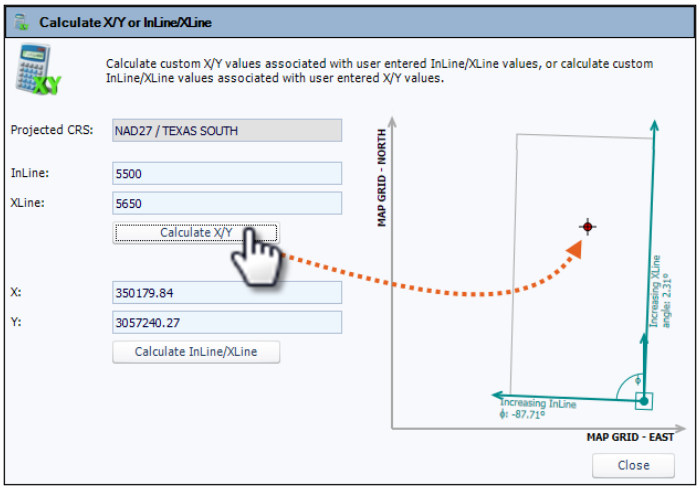


3. The **Projected CRS** and the geographical drawing of the bin grid displays in the new window.

» To calculate the X and Y coordinates, enter the inline and crossline values in the given fields. Click **Calculate X/Y**.

» To calculate the inline and crossline locations, enter the X and Y coordinates in the given fields. Click **Calculate InLine/XLine**.

The geographical location displays on the bin grid in the window.



Tip:
Clicking directly on a position in the image populates the values for the X, Y, inline and crossline values in the associated fields.

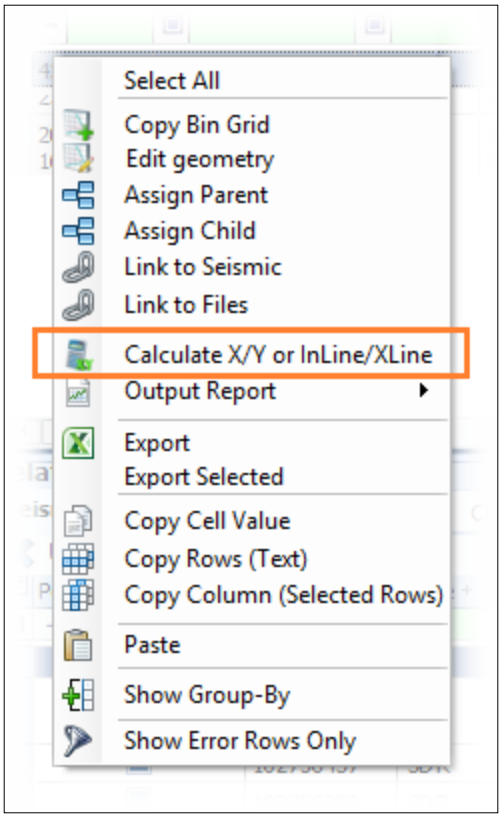
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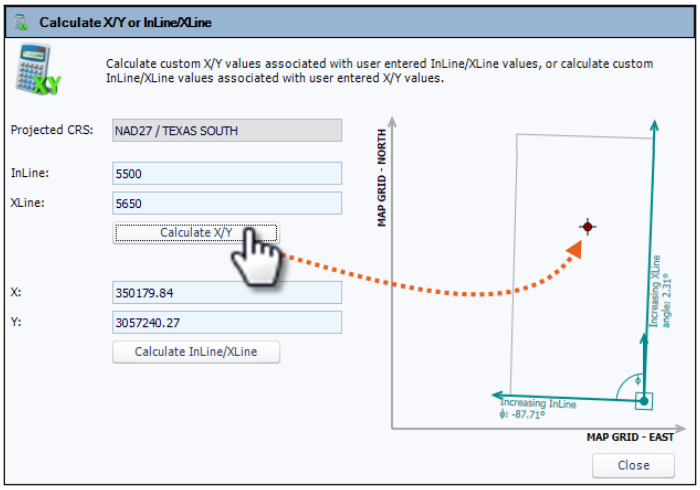
1. From the **Bin Grid Properties** grid Click to select the bin grid.
2. Right-click and select **Calculate X/Y or InLine/XLine**.



3. The **Projected CRS** and the geographical drawing of the bin grid displays in the new window.

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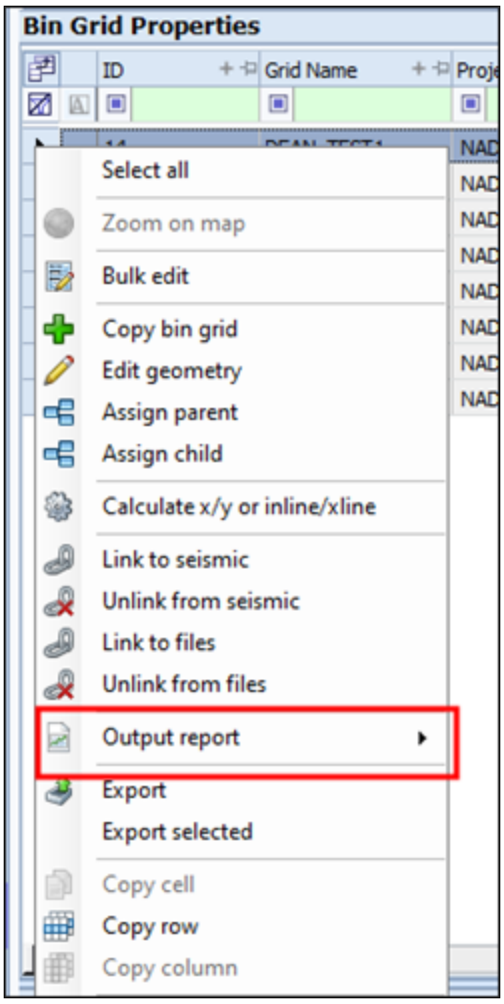
Tip:
Clicking directly on a position in the image populates the values for the X, Y, inline and crossline values in the associated fields.

Export a load sheet

The bin grids in the Bin Grid module are available for exporting as load sheets for loading your seismic survey data to a workstation for interpretation.

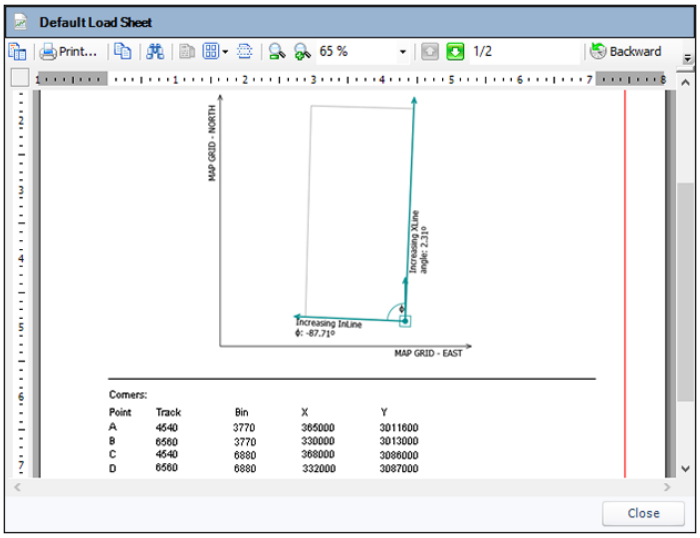
To export a load sheet:

1. Click to select the bin grid in the **Bin Grid Properties** grid.
2. Right-click and point to **Output Report**.



3. Click the load sheet you want to download.

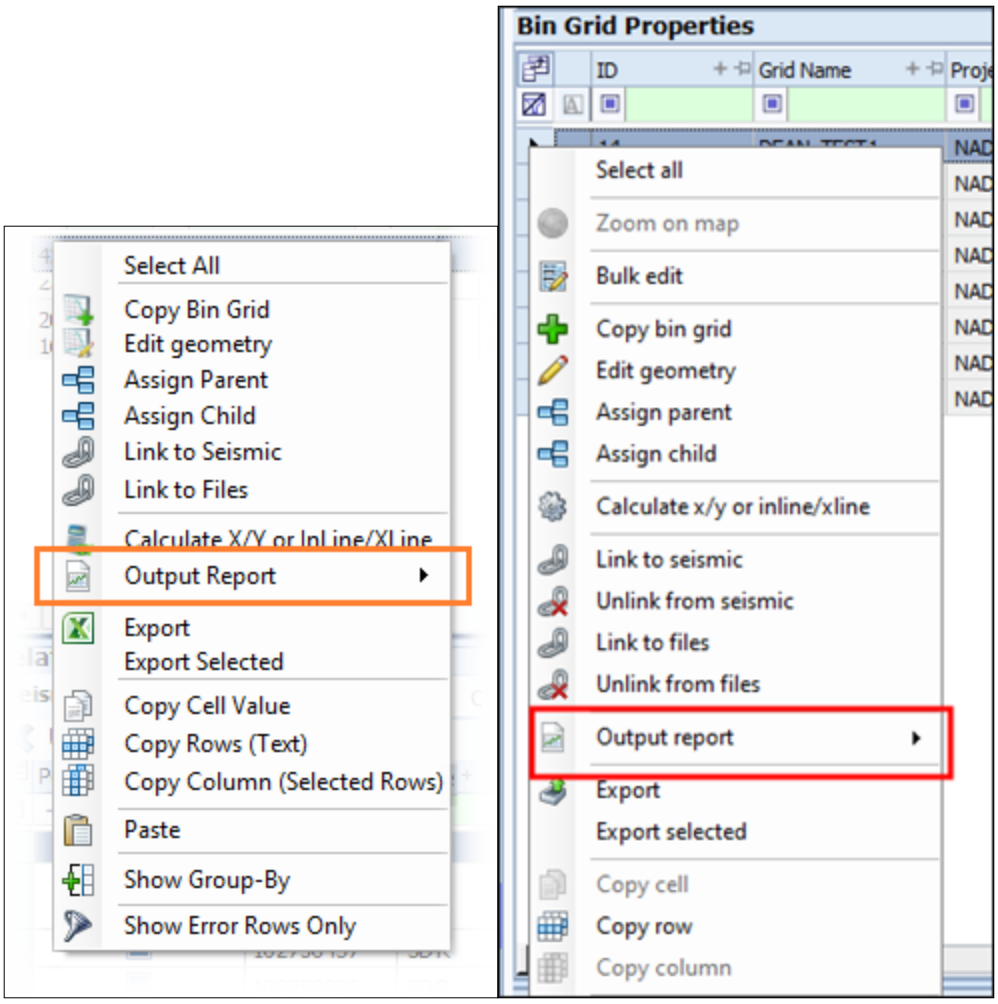
The load sheet opens in a new window.



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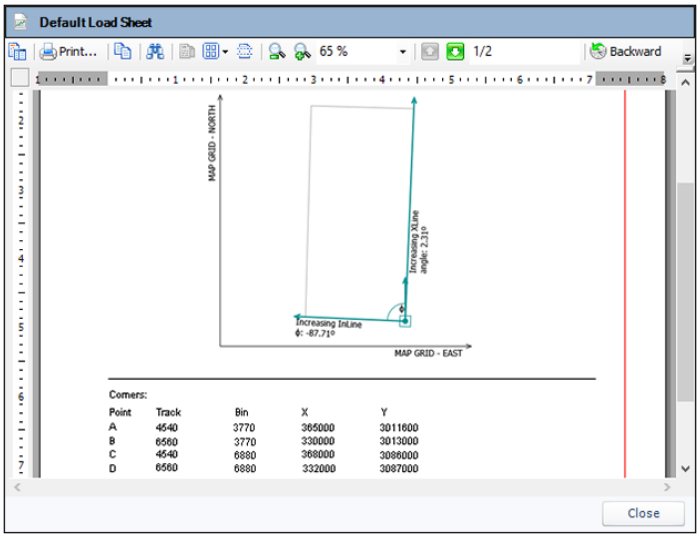
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4.0 Workflows

The general workflows for organizing and maintaining seismic data in Exploration Archives varies across users. The order of the general workflows, and the steps in each workflow do not have to be completed exactly as presented. However, the activities are listed in a logical sequence.

As you work through the steps, you will discover that you have to complete some of the tasks before beginning others. For example, you must first add a seismic survey before you can link any navigation to it, and you must add the products before making them available for ordering.

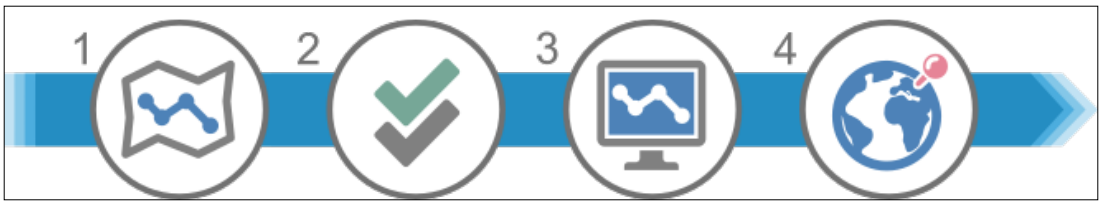
General workflows include :

1. Adding new seismic survey data



1. Acquire new data.
2. In the **Seismic** module of Exploration Archives Desktop, add a new seismic record and enter the associated details.
3. Add and link the contract to the seismic record, if applicable.

2. Adding seismic survey navigation



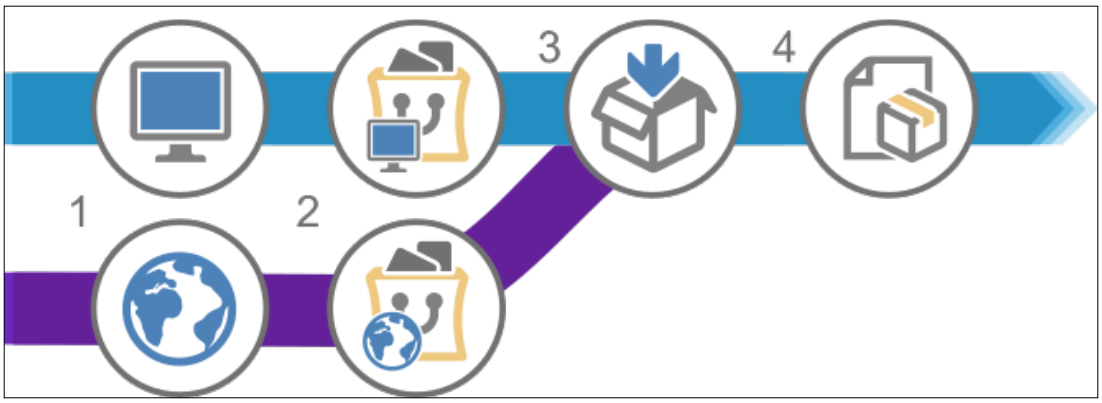
1. Receive seismic survey navigation.
2. Perform quality control on the navigation according to your company procedures.
3. Add the seismic navigation to the seismic record in Exploration Archives.
4. Verify that the location is mapped correctly.

3. Adding seismic survey products



1. Create a catalog session in the **New Item Catalog** module.
2. Add files and media to the catalog session.
3. Link the files to the media and link the files to the seismic.
4. Perform quality control activities according to your company procedures.
5. Move the files to production.

4. Ordering products



1. Depending on your role and access to Exploration Archives:
   - » Use Exploration ArchivesDesktop to create a data request
   - » Use Exploration ArchivesBrowser to create a data request
2. Continue creating the request:
   - » Use Exploration ArchivesDesktop to add products
   - » Use Exploration ArchivesBrowser to add products
3. Using Exploration Archives Desktop, review the data request and execute the order. Package the products and send for delivery.
4. Monitor the delivery of the products.

The general workflows for organizing and maintaining seismic data in Exploration Archives varies across users. The order of the general workflows, and the steps in each workflow do not have to be completed exactly as presented. However, the activities are listed in a logical sequence.

As you work through the steps, you will discover that you have to complete some of the tasks before beginning others. For example, you must first add a seismic survey before you can link any navigation to it, and you must add the products before making them available for ordering.

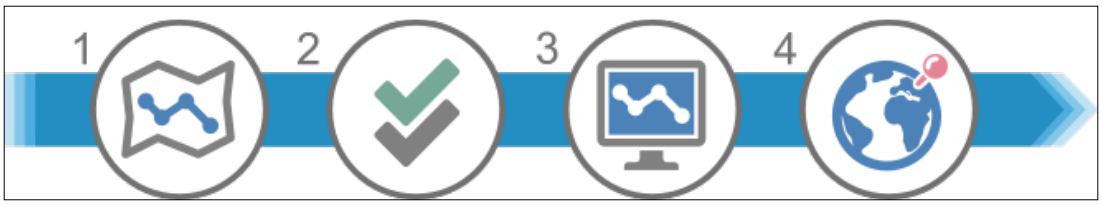
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2. Adding seismic survey navigation



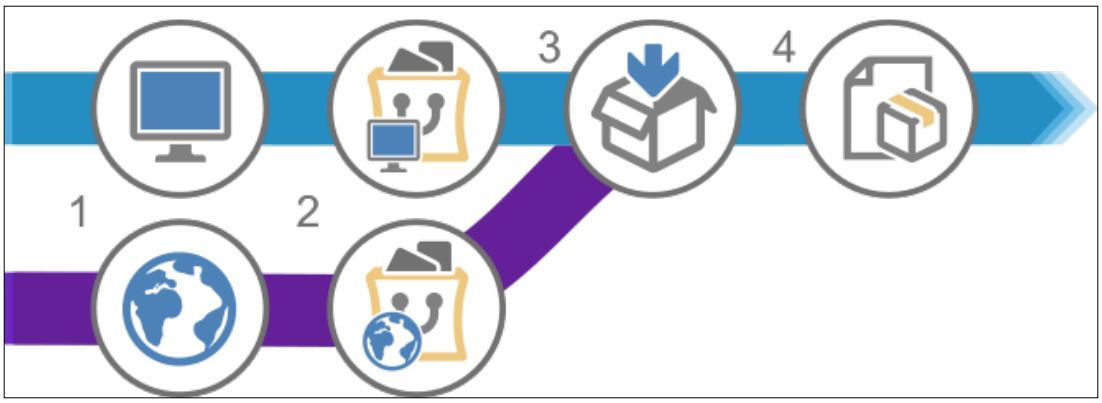
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3. Add the seismic navigation to the seismic record in Exploration Archives.
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3. Adding seismic survey products



1. Create a catalog session in the **New Item Catalog** module.
2. Add files and media to the catalog session.
3. Link the files to the media and link the files to the seismic.
4. Perform quality control activities according to your company procedures.
5. Move the files to production.

4. Ordering products



1. Depending on your role and access to Exploration Archives:
   - » Use Exploration Archives Desktop to create a data request
   - » Use Exploration Archives Browser to create a data request
2. Continue creating the request:
   - » Use Exploration Archives Desktop to add products
   - » Use Exploration Archives Browser to add products
3. Using Exploration Archives Desktop, review the data request and execute the order. Package the products and send for delivery.
4. Monitor the delivery of the products.

4.1 License

New in this version:

- The License Editor has been modified to use the new ESRI Geometry Editor.
- The Map Selection tools and Cutout Tools have been updated to reflect the new Geometry Editor

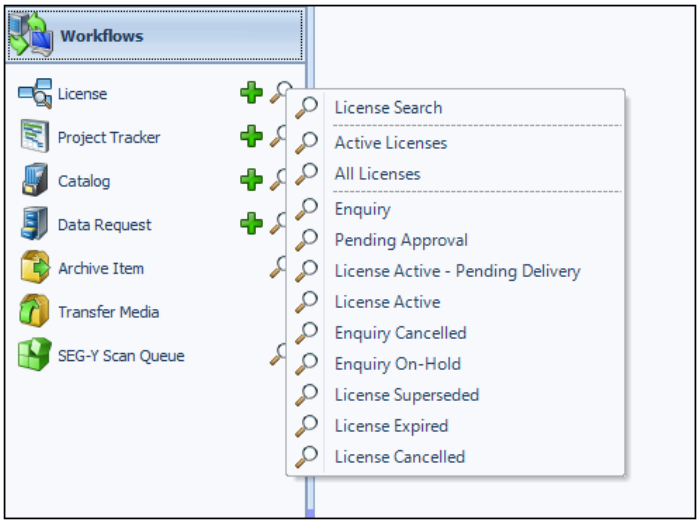
The License module includes a full spectrum of options and resources to manage your data license workflow and monitor progress.

A variety of features and tools are available to create, modify and query data licenses.

The information you add to a license in Exploration Archives provides or initiates all the necessary deliverables for the transaction. The License module calculates fees according to the coverage area that you define using the cutout tool, while the document tool generates the contract and license documentation.

To generate a search and open items in the License module:

1. Click **search** next to **License** in the Navigation panel.



2. Select the appropriate search type and the search window will open
3. Enter your values and click **Search**.

The results open in the **License** module. The grid displays the information for each item. To view the **Related Records** for an item, click on a row in the grid and the associated details display in the **Related Records** tabs.

To view the **Related Records** for multiple items, turn on **Bulk Mode**, select multiple items in the **Grid** grid and the associated information for all selected items display in the **Related Records** tabs.

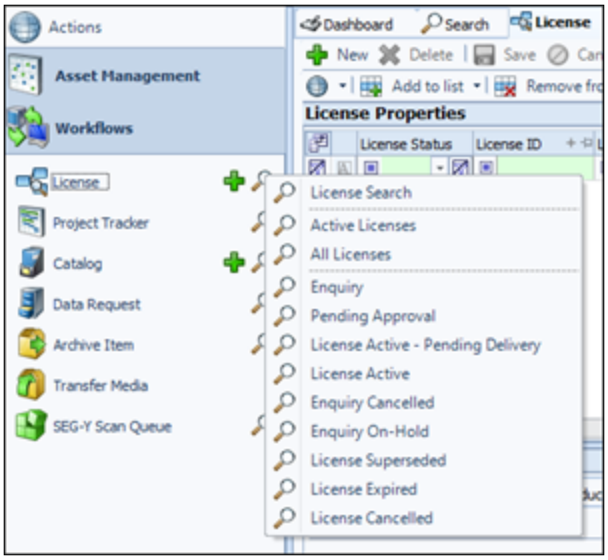
For information regarding status searches, refer to Understanding license statuses.

The License module includes a full spectrum of options and resources to manage your data license workflow and monitor progress. A variety of features and tools are available to create, modify and query data licenses.

The License module is accessible in the navigation panel under **Workflows**.

The information you add to a license in Exploration Archives provides or initiates all the necessary deliverables for the transaction. The License module calculates fees according to the coverage area that you define using the cutout tool, while the document tool generates the contract and license documentation.

To open items in the **License** module:



1. Click **search** next to **License** in the Navigation panel.
2. Select the appropriate search type and the search window will open
3. Enter your filter values and click **Search**.

The results open in the **License** module. The grid displays the information for each item. To view the **Related Records** for an item, click on a row in the grid and the associated details display in the **Related Records** tabs.

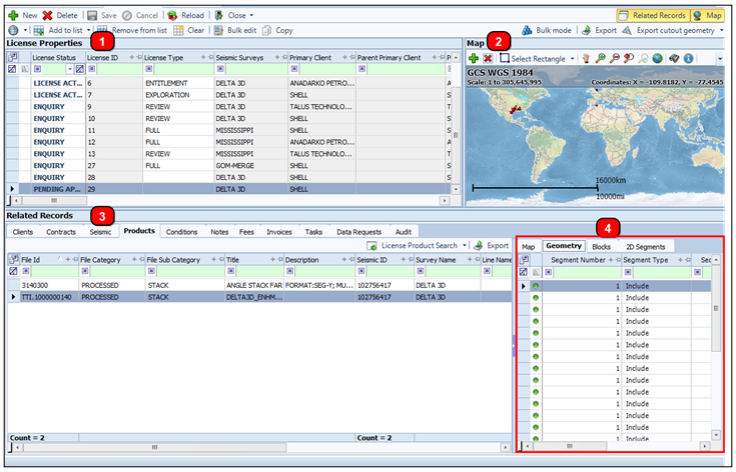
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For information regarding status searches, refer to Understanding license statuses.

Understand the screen layout

The **License** module is for viewing and managing licenses. The main screen of the License module provides a view of the information related to the licenses from your search criteria. In addition to the main view, the module has an **Editor View** and a full screen view. For information about the **Editor View**, refer to "Create a license" on page 271.

The main view is split into the following panes:

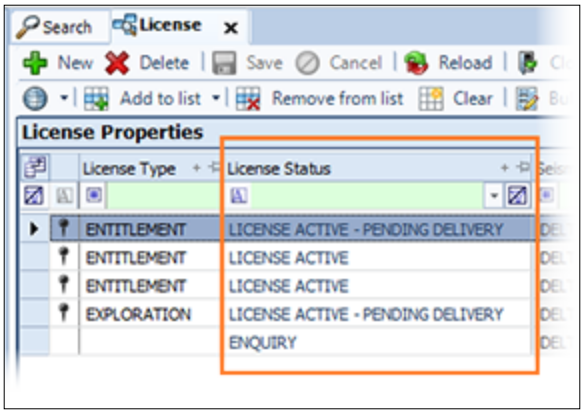


1. **License Properties grid**: Lists the licenses with the associated detail across various columns.
2. **Map**: Displays the location of licensed data.
3. **Related Records**: Displays information for the selected license in the License Properties grid. The Related Records panel includes several tabs with different categories of information.
4. The **Products** tab in the Related records panel includes a set of secondary tabs for viewing detail related to a selected product.

License statuses

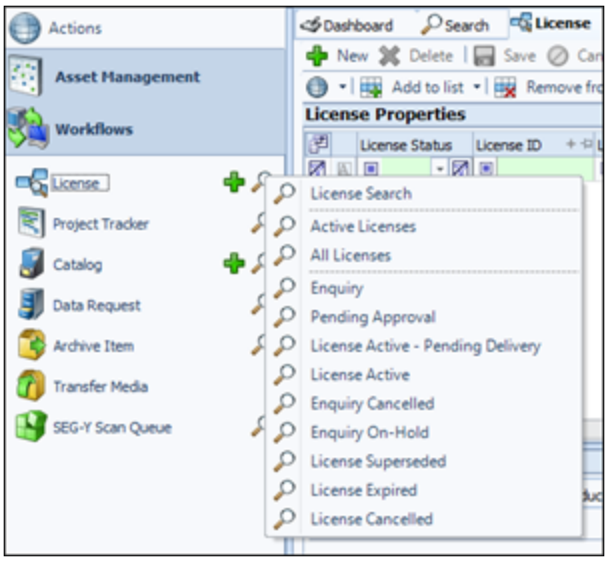
The **license status** indicates the progress of a license.

The status of a license displays in the License Status column of the License Properties grid.



You can use the search option to search all licenses, or according to status.

To use the status search, click search next to License and click a status category to open the search window.



The statuses available for the working phase of a license include:

- **Enquiry**: This is the initial status for a newly created license. The sales associate is collecting information and specifying the license details, monitoring tasks and generating the required

documentation. After entering all required information, the license is ready for the *Pending Approval* status.

- **Pending Approval**: At this stage, the user generates and sends a proposal and license agreement to the client for approval. If the client does not approve the license agreement, you can recall the license back to the *Enquiry* status to modify the information.After the client approves the license agreement, change the license status to *License Active - Pending Delivery*
- **License Active - Pending Delivery**: The client has reviewed and approved the license agreement. Details have transferred to a Data Request for preparation.
- **License Active**: Client has received the data.

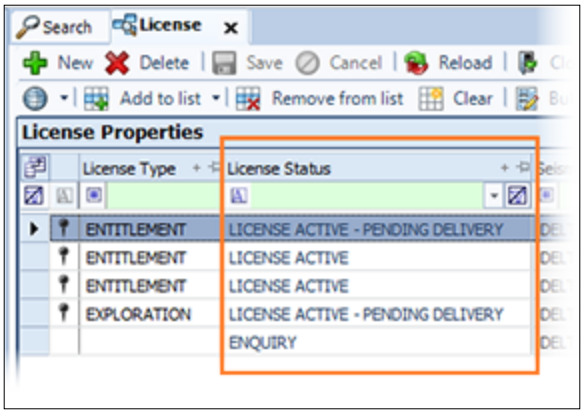
Aside from the typical working statuses, the License module includes several alternative end-case statuses:

- **Enquiry Cancelled**: Cancelled, information saved.
- **Enquiry On-Hold**: On hold with the option to progress in the future.
- **License Superseded**: License has been replaced.
- **License Expired**: Expiration date has passed, if expiry was set.
- **License Cancelled**: License has been cancelled.

To change a license status, refer to "Updating a license status" on the next page.

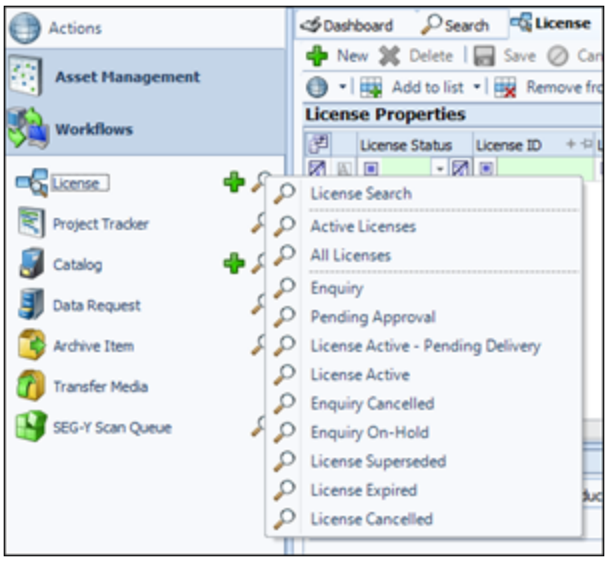
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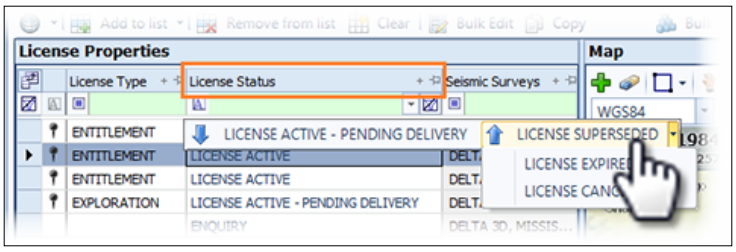
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- **License Cancelled**: License has been cancelled.

To change a license status, refer to "Updating a license status" below.

Updating a license status

The license status indicates the progress of a license. To update the status of a license, locate the license in the **License Properties** grid of the License module. Click in the cell of the **License Status** column to open the status options. Click the new status for

the license and **Save**.



To access this functionality, you must have permission for changing a license status added to your profile. Your administrator sets the user securities for the license status functionality.

> **Note:**
> The status options available are restricted by your company's workflow. Not all statuses are available from the current status of a license.

Create a license

The **License** module maintains the current information for each license. Included with the **License** module is the **Editor View** for creating and editing licenses. You must open the **Editor View** to add or edit detail in the **License Properties** area, and the **Seismic** tab and **Products** tab of the **Related Records**.

To create a new license:

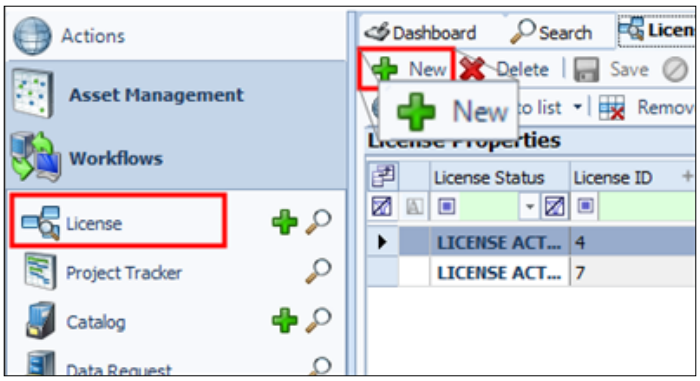
Creating a new license opens the **Editor View** with a blank record.

The tasks for creating a license involve:

- Adding general information to the **License Properties** grid.
- Adding seismic and associated products.
- Creating the cutouts.

To begin a new license and add the general information:

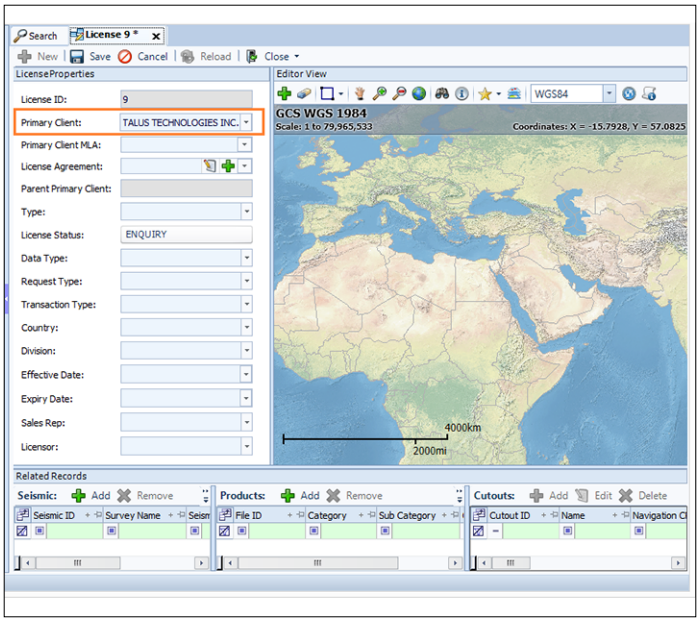
1. Click **License** in the navigation panel to open the module.
2. Click **New** in the workspace toolbar and the **Editor View** opens in a new tab.



Note:
There may be a rare case when starting a new license that all the fields are not available. If this is the case, check the Map panel to make sure that the correct map format appears in the drop-down window. If it isn't the correct format, use the drop-down to change the map to the correct one.

Exploration Archives auto-populates a **License ID** and the **License Status** sets to *Enquiry*.

3. In the **License Properties** area, locate the **Primary Client** field (required) and select the primary client for the license.

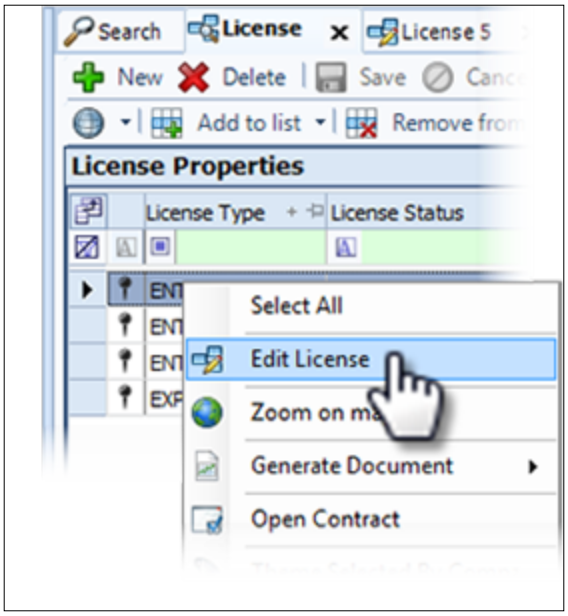


4. In the **Primary Client MLA** field, select the current master license agreement. The options available for this field populate according to the selection you made for the **Primary Client** field.
5. Select the information for the remaining fields in the **License Properties** area, as appropriate. Since the *Enquiry* status is an in-progress status, you can return to the license later to add information as you receive it.
6. Click **Save** and proceed to "To add a survey:" on page 277.

To edit an existing license:

Note:
The information in the **License Properties** grid is read only. To edit the detail, you must open the **Editor View**.

To open the **Editor View**, right-click on the license to open the context menu and click **Edit License**. The **Editor View** opens in a new tab with the details of the license available for editing.

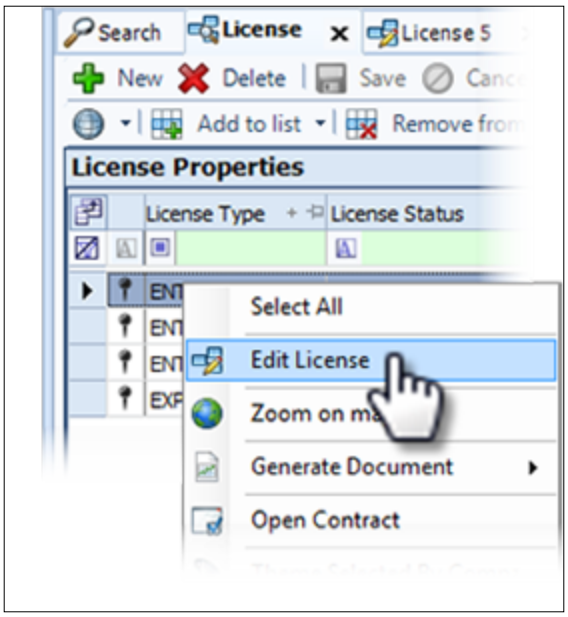


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To edit an existing license:

Note:
The information in the **License Properties** grid is read only. To edit the detail, you must open the **Editor View**.

To open the **Editor View**, right-click on the license to open the context menu and click **Edit License**. The **Editor View** opens in a new tab with the details of the license available for editing.



To create a new license:

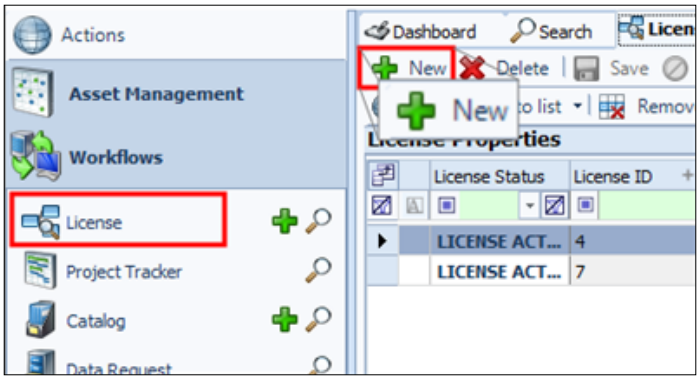
Creating a new license opens the **Editor View** with a blank record.

The tasks for creating a license involve:

- Adding general information to the **License Properties** grid.
- Adding seismic and associated products.
- Creating the cutouts.

To begin a new license and add the general information:

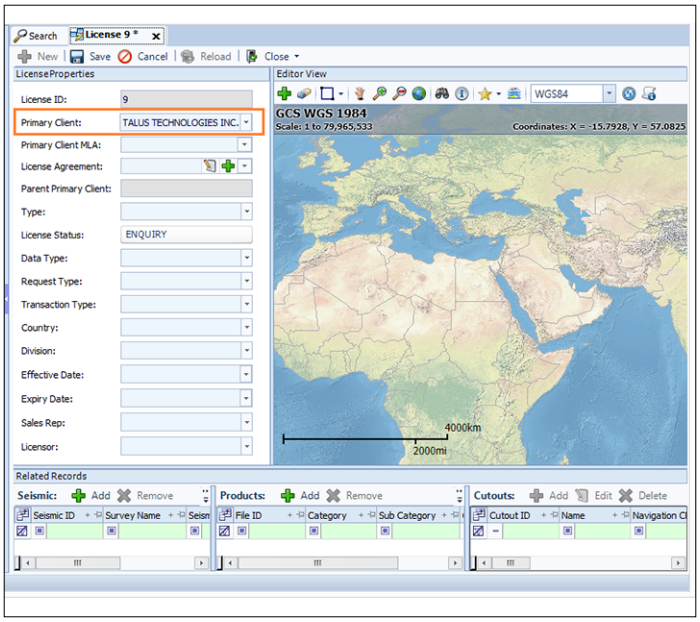
1. Click **License** in the navigation panel to open the module.
2. Click **New** in the workspace toolbar and the **Editor View** opens in a new tab.



> **Note:**
> There may be a rare case when starting a new license that all the fields are not available. If this is the case, check the Map panel to make sure that the correct map format appears in the drop-down window. If it isn't the correct format, use the drop-down to change the map to the correct one.

Exploration Archives auto-populates a **License ID** and the **License Status** sets to *Enquiry*.

3. In the **License Properties** area, locate the **Primary Client** field (required) and select the primary client for the license.



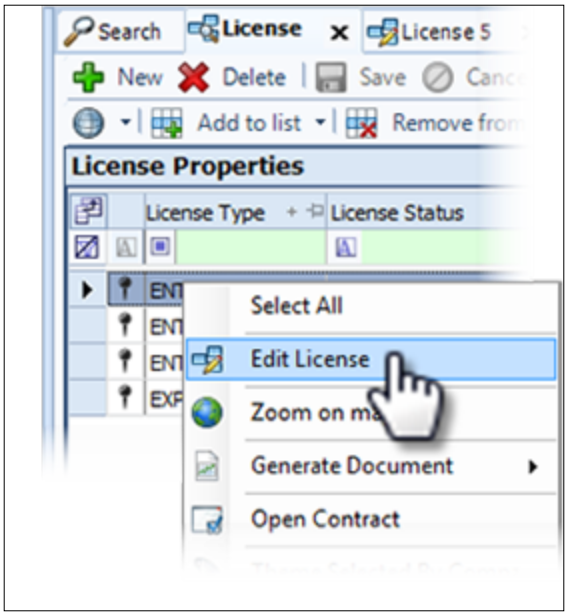
4. In the **Primary Client MLA** field, select the current master license agreement. The options available for this field populate according to the selection you made for the **Primary Client** field.
5. Select the information for the remaining fields in the **License Properties** area, as appropriate. Since the *Enquiry* status is an in-progress status, you can return to the license later to add information as you receive it.
6. Click **Save** and proceed to "To add a survey:" on page 277.

Add a survey or product

Exploration Archives uses the coverage defined in a cutout to calculate the fees and generate license documentation. The cutout tool provides a variety of features for making selections on a map and creating the cutout.

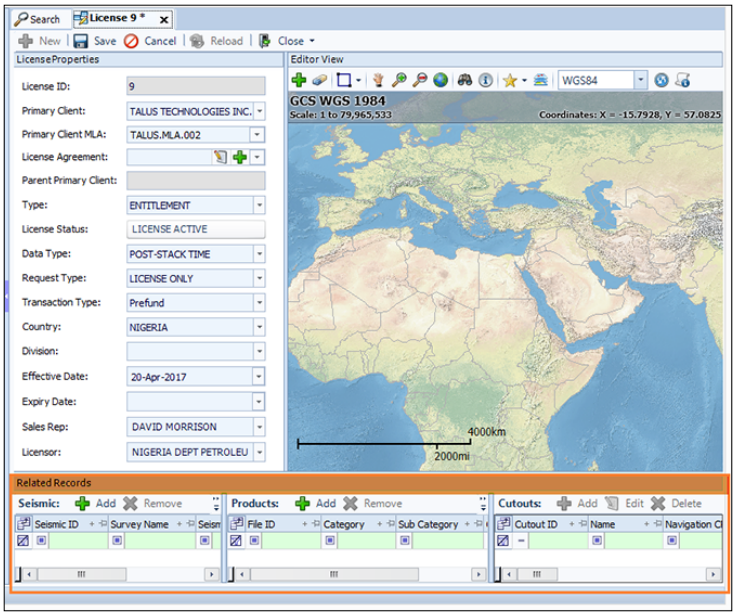
To prepare for creating a cutout, you must first add the seismic survey and/or the product files that the cutout will be derived from. The functionality for adding surveys and products is available in the **Editor View**. Opening the **Editor View** is part of the steps in creating a new license (refer to Creating a license). Alternatively, you can open the **Editor View** from an existing license.

To open the Editor View from an existing license:



Locate the license in the **License Properties** grid of the License module. Right-click on the license to populate the context menu and click **Edit License**. The **Editor View** opens in a new tab and displays the license detail.

From the **Editor View**, the lower panel displays the **Related Records** information and allows you to add **Seismic**, the associated **Products** and the **Cutouts**.

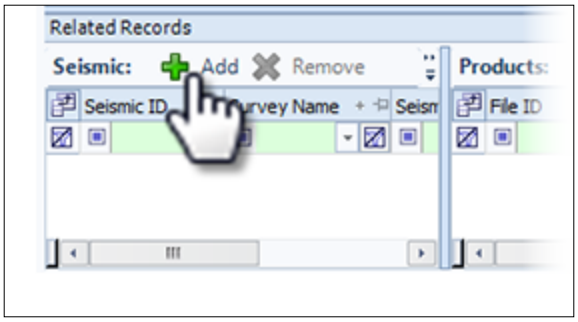


From the **Editor View** you can add a full survey or select particular products within a survey.

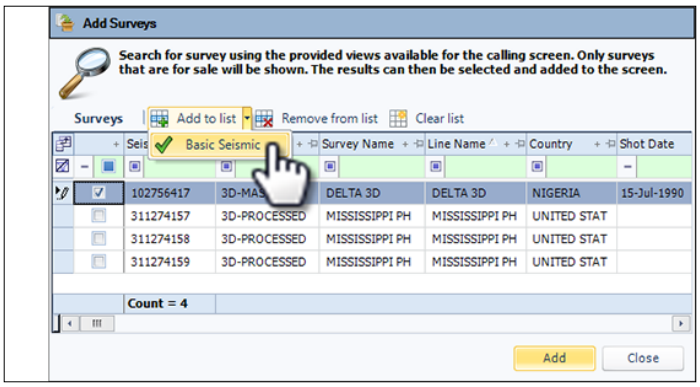
> **Note:**
> There may be a rare case when starting a new license that all the fields are not available. If this is the case, check the Map panel to make sure that the correct map format appears in the drop-down window. If it isn't the correct format, use the drop-down to change the map to the correct one.

To add a survey:

1. Click **Add** in the **Seismic** grid. The **Add Surveys** window opens as a working grid to search for the survey(s), and add to the license.



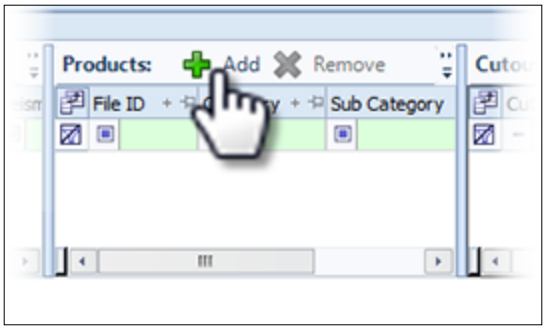
2. Click **Add to list** and select a search.



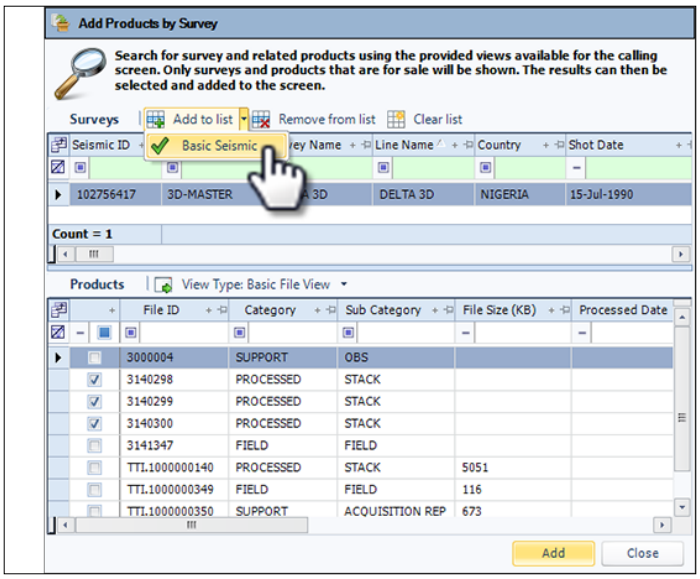
3. Enter your search criteria then click **Search**. The results populate in the **Surveys** grid and displays the surveys available for sale.
4. Select the checkboxes for the survey(s) you want to add to the license and click **Add**. The selected survey(s) add to the **Related Records** area of the license.
5. Repeat these steps to add another survey, or click **Close** if you are done.

To add products:

1. Click **Add** in the **Products** grid. The **Add Products by Survey** window opens as a working grid to search for the survey(s) and generate a list of associated products.



2. Click **Add to list** and select a search.



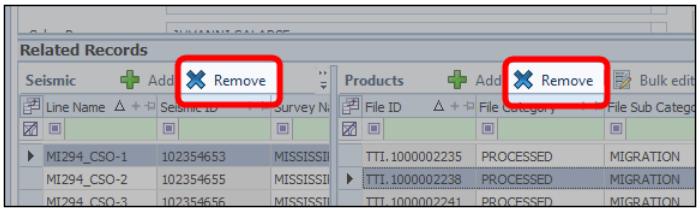
3. In the search window, enter your search criteria and click **Search**. The results populate in the **Surveys** grid with the associated products available for sale in the **Products** grid.
4. Select the check boxes for the product(s) you want to add to the license and click **Add**. The selected product(s) and associated survey adds to the **Related Records** area of the license.
5. Repeat these steps to add another product, or click **Close** if you are done.

Remove a survey or product

To remove a survey or product from a license:

1. Open the License module and locate the license in the **License Properties** grid.
2. Right-click on the license to open the context menu and select **Edit License** to open the **Editor View**.

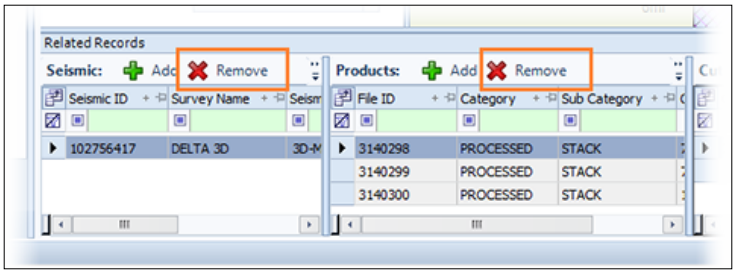
3. In the **Related Records** area, select the item to remove in the **Seismic** or **Products** grid and click **Remove**.



Note:
Removing a seismic survey removes all products associated to that survey. Removing a product just removes the single product.

To remove a survey or product from a license, open the License module and locate the license in the **License Properties** grid. Right-click on the license to open the context menu and select **Edit License** to open the **Editor View**.

In the **Related Records** area, select the item to remove in the **Seismic** or **Products** grid and click **Remove**.



Note:
Removing a seismic survey removes all products associated to that survey. Removing a product just removes the single product.

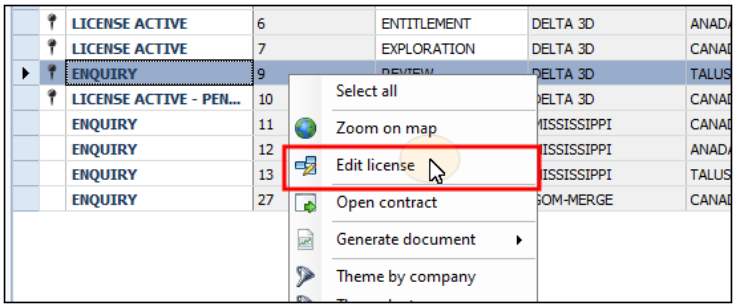
Add a cutout

The area defined by a cutout is the basis for calculating license fees and generating license documentation. The cutout is derived from a survey or from a product, depending on the client request.

To add a cutout, you must first add a survey or product (refer to "To add a survey:" on page 277).

The functionality for adding a cutout is available in the **Editor View** of a license. Opening the **Editor View** is part of the steps in creating a new license (refer to Creating a license). Alternatively, can open the **Editor View** from an existing license.

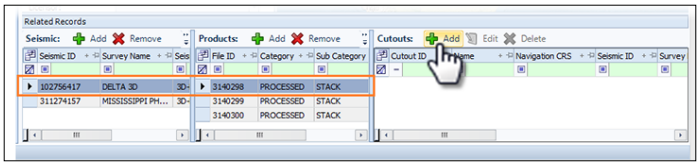
To open the Editor View from an existing license:



Locate the license in the **License Properties** grid of the License module. Right-click on the license to populate the context menu and click **Edit License**. The **Editor View** opens in a new tab and displays the license detail.

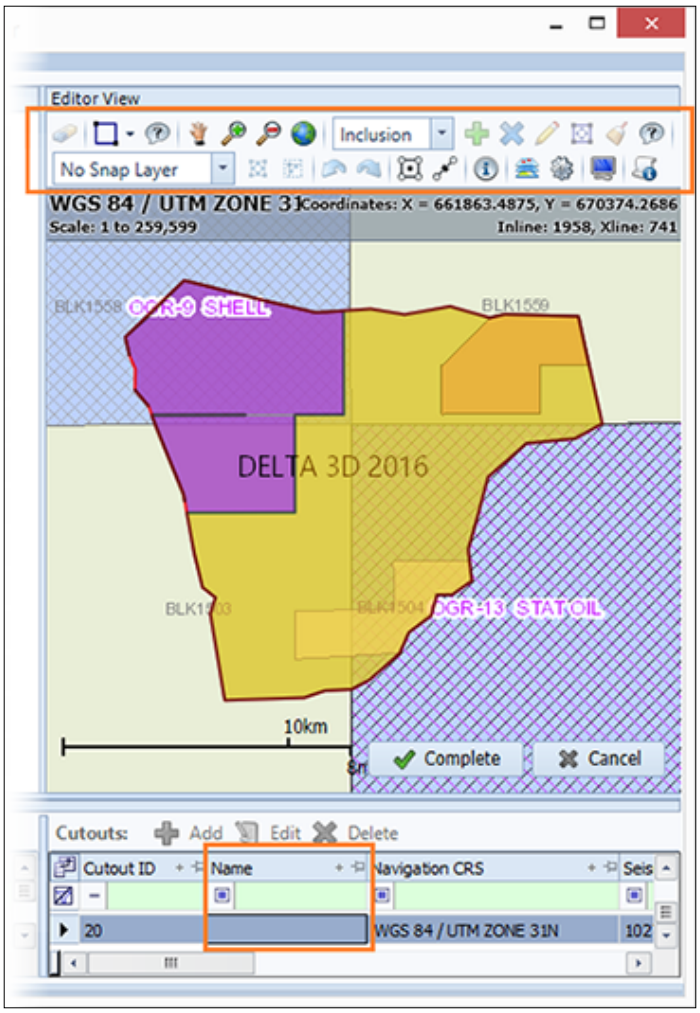
To add a cutout:

1. From the **Editor View**, select the originating seismic or product in the **Related Records**.
2. In the **Cutout** panel, click **Add**.



A new row with an auto-generated **Cutout ID** adds to the **Cutout** panel as a placeholder for the cutout. The map view zooms to the associated survey, and the toolbar changes to include a variety of cutout tools.

3. Add a name to the **Name** column.



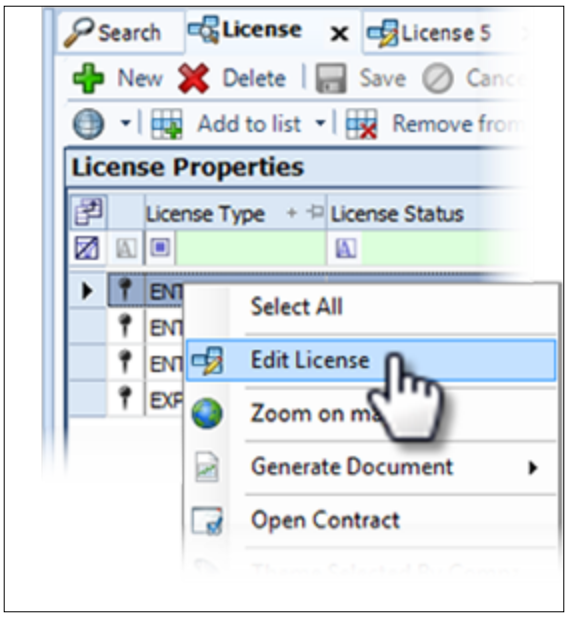
4. Use the cutout editor to create the cutout (refer to "Using the cutout editor" on page 285).
5. When done, Click **Complete**.

The area defined by a cutout is the basis for calculating license fees and generating license documentation. The cutout is derived from a survey or from a product, depending on the client request.

To add a cutout, you must first add a survey or product (refer to "To add a survey:" on page 277).

The functionality for adding a cutout is available in the **Editor View** of a license. Opening the **Editor View** is part of the steps in creating a new license (refer to Creating a license). Alternatively, can open the **Editor View** from an existing license.

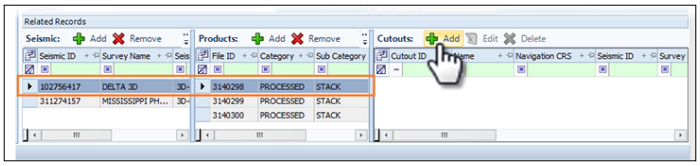
To open the Editor View from an existing license:



Locate the license in the **License Properties** grid of the License module. Right-click on the license to populate the context menu and click **Edit License**. The **Editor View** opens in a new tab and displays the license detail.

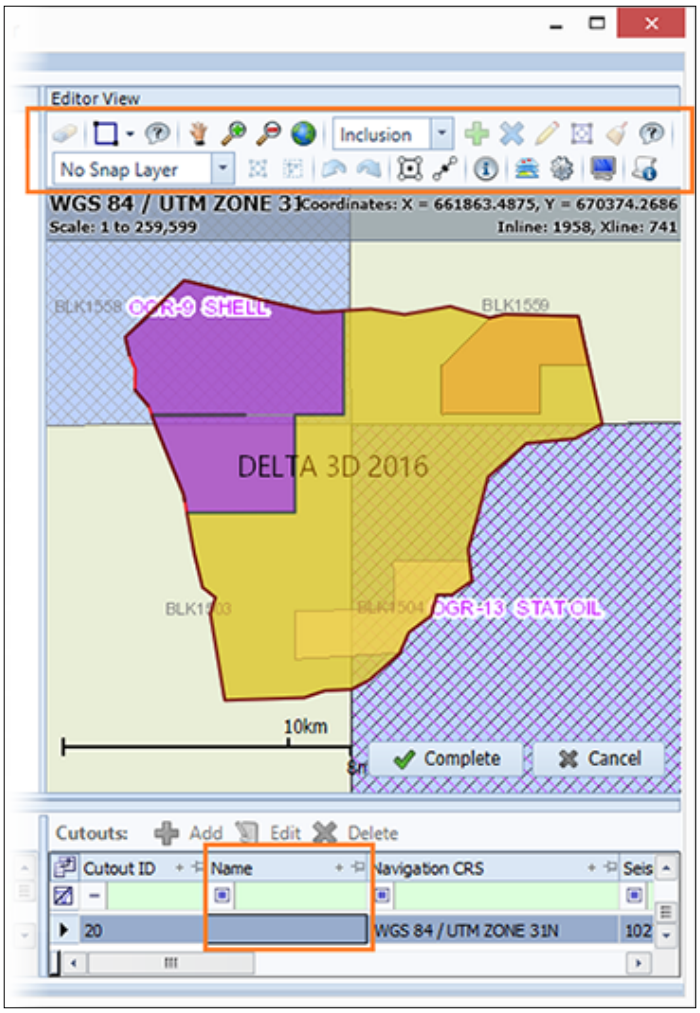
To add a cutout:

1. From the **Editor View**, select the originating seismic or product in the **Related Records**.
2. In the **Cutout** panel, click **Add**.



A new row with an auto-generated **Cutout ID** adds to the **Cutout** panel as a placeholder for the cutout. The map view zooms to the associated survey, and the toolbar changes to include a variety of cutout tools.

3. Add a name to the **Name** column.



4. Use the cutout editor to create the cutout (refer to "Using the cutout editor" on page 285).
5. When done, Click **Complete**.

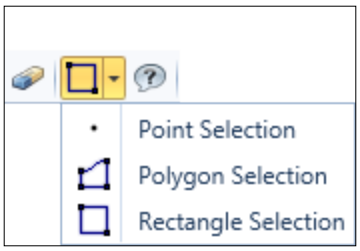
Creating a cutout

Creating a cutout for a license involves Using the cutout editor from the **Editor View** of the License module. The cutout editor provides a working platform for creating and modifying a cutout.

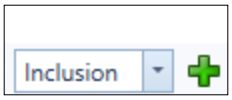
The features available in the cutout editor provide a multitude of options for completing the task of creating a cutout. For a full description of the features refer Understanding the toolbar.

Here is a generic overview of a typical workflow for creating a cutout:

1. Use the selection tools to select features from the survey. The selection you create is a draft for the cutout. After adding the selection as a cutout, you can modify further.



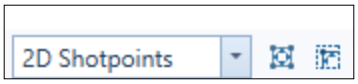
2. To add a selection as part of the cutout, decide what type of cutout you are adding; **Inclusion** or **Exclusion**. Select the type and then click **Add**.



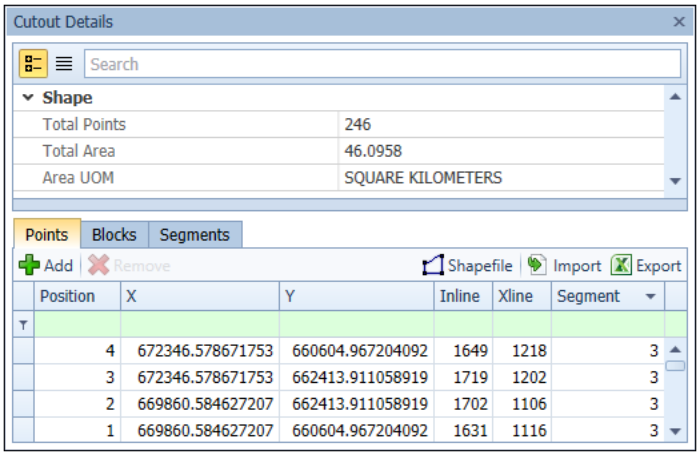
3. Modify the cutout using the various cutout editing tools. This includes creating more selections to **Add** or **Remove** from the cutout.



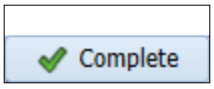
4. Use the snapping tools to help set the cutout.



5. Open the **Cutout Details** to review the information and edit as needed. Alternatively, you can features in the **Cutout Details** window to import the points or segments instead of drawing the cutout.



6. When the details for your cutout are correct, click **Complete** in the lower right corner of the map and the information adds to the **Cutouts** grid.

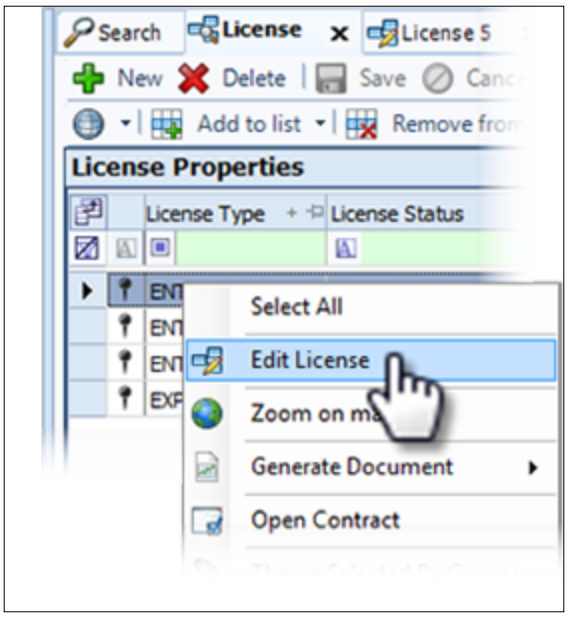


Using the cutout editor

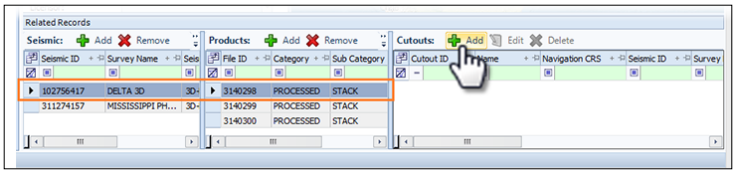
The cutout editor is available from the **Editor View** of a license. Opening the **Editor View** is part of the steps in creating a new license (refer to Creating a license). Alternatively, you can open the **Editor View** from an existing license.

To open the Editor View from an existing license...

Locate the license in the **License Properties** grid of the License module. Right-click on the license to populate the context menu and click **Edit License**. The **Editor View** opens in a new tab and displays the license detail.

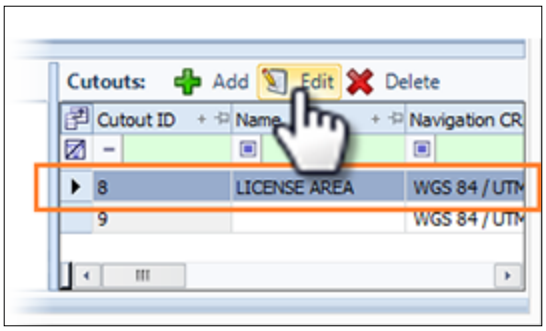


From the **Editor View**, select the originating seismic or product in the **Related Records** and click **Add** in the **Cutout** panel.

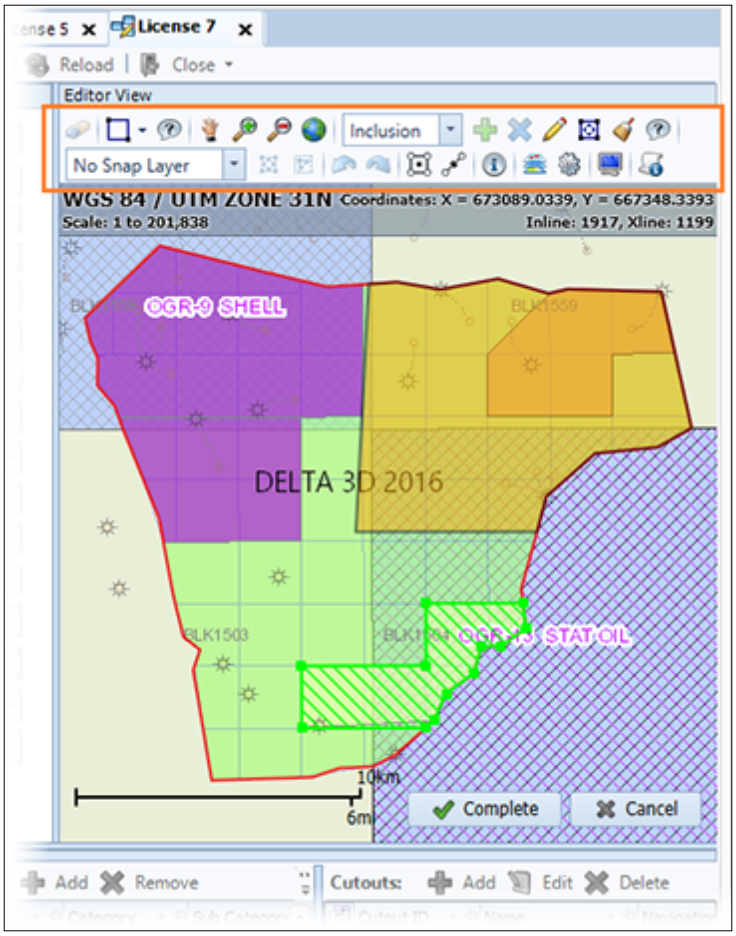


To edit an existing cutout, select the cutout in the **Cutouts** panel and click **Edit**.

To delete a cutout, select the cutout in the **Cutouts** panel and click **Delete**.



Whether adding a new cutout or editing an existing cutout, the cutout editor opens with a new set of tools in the map toolbar specific for cutouts. The map automatically zooms to the associated survey. For an existing cutout that you are editing, the survey displays with the cutout in a selected mode. In this screenshot, the cutout selected for editing displays with a green border.

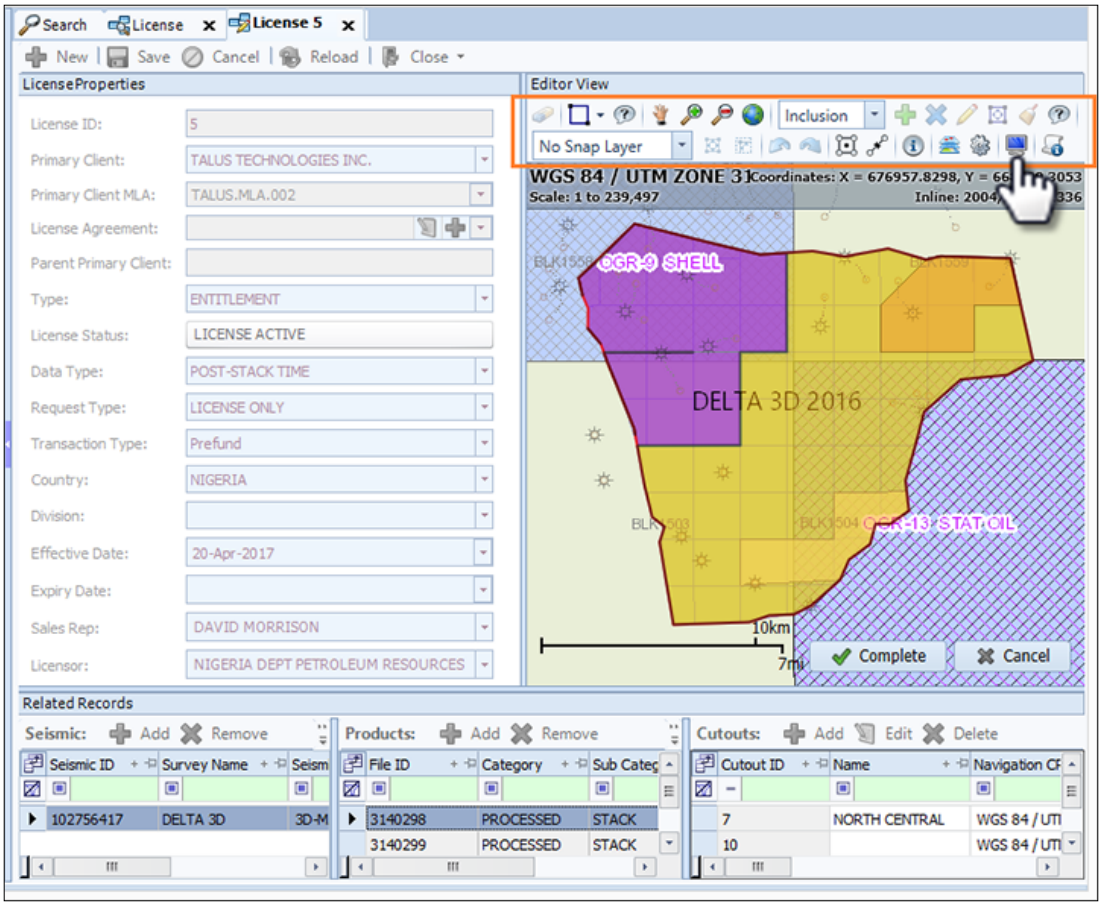


Choosing a view

The cutout editor offers two views for working on a cutout: the default view and the fullscreen view.

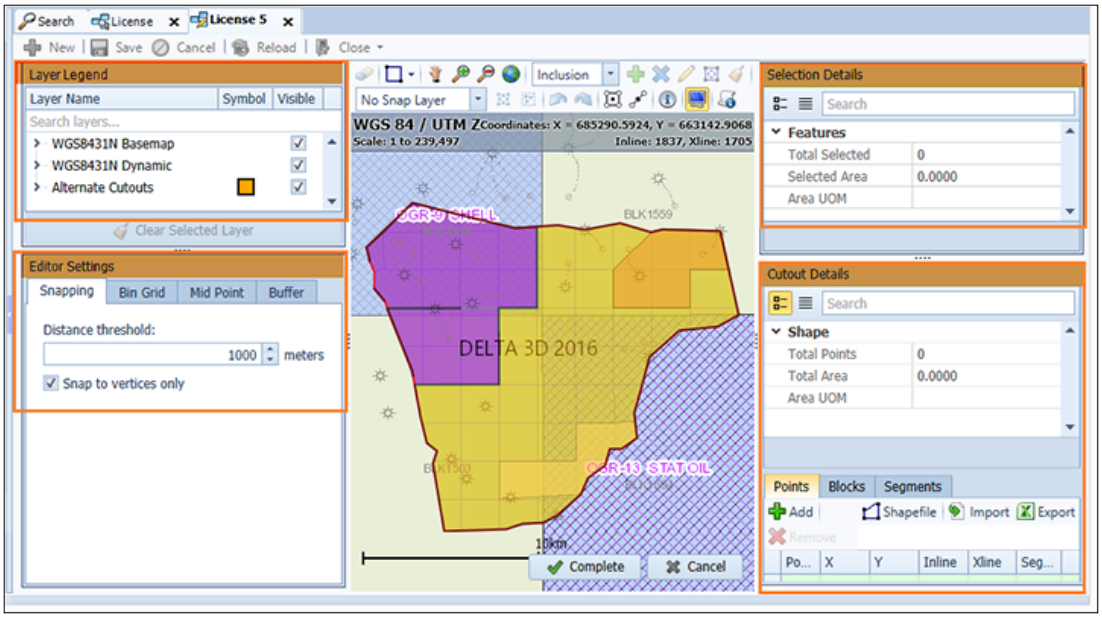
Editor View as default

The default view maintains the layout of the **Editor View** with the **License Properties** area, the **Related Records** area and the map panel. The default view opens with the map zoomed to the selected survey and new items in the toolbar for working with cutouts.



Fullscreen view

The fullscreen view offers a workspace specifically designed for working with cutouts. The fullscreen view opens with specific toolbar items open by default. To open the fullscreen view, click fullscreen  in the map toolbar. The fullscreen view opens with the map in the centre panel with two cutout tools docked on each side; **Layer Legend**, **Editor Settings**, **Selection Details** and **Cutout Details**.



The same cutout-detail panes docked in fullscreen are accessible from the toolbar in the default view. In the default view, the panes open as floating windows over the map.

Access the panes in the default view using these toolbar items:

Layer Legend: Opens the **Layer Legend** with ability to modify.

Editor Settings: Open to specify the settings for snapping, bin grids, mid point and buffers.

Selection Details: View details of the selection features.

Cutout Details: View details of the cutout including point, block and segment detail.

Understanding the cutout toolbar

After opening the **Editor View** for a cutout ("Using the cutout editor" on page 285), the map automatically zooms to the associated survey. For editing an existing cutout or

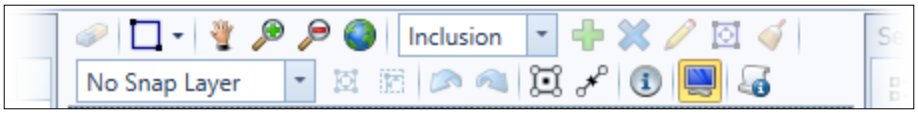
adding a new one, the **Cutout Editor** displays a set of tools in the map toolbar specific for cutouts.

If you click fullscreen  in the map toolbar, the fullscreen view opens with specific toolbar items opened by default; **Layer Legend**, **Editor Settings**, **Selection Details** and **Cutout Details**. The fullscreen view omits those items from the toolbar, while the default view displays the items in the toolbar for you to open individually.

Toolbar in default view:



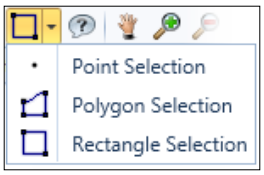
Toolbar in fullscreen view:



Cutout tools and functionality:



- **Fullscreen**: Click to open the **Fullscreen** view. The fullscreen view offers a workspace specifically designed for working with cutouts. The fullscreen view opens with the map in the centre panel with two cutout tools docked on each side; **Layer Legend**, **Editor Settings**, **Selection Details** and **Cutout Details**.



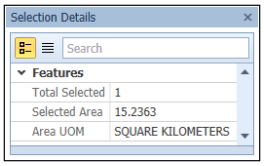
- **Selection**: Selects an area, or points, from the survey displayed on the map. Use this tool to create the base of your cutout. The selection you create is a draft for the cutout. To create the selection as part of your cutout, you must add  the selection to the cutout.



- **Midpoints**: Click to display the midpoints on your selection.

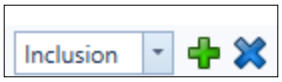


- **Selection Details**: Click to open the **Selection Details** window.





- **Erase Selection**: Erases the selection(s) that you created.



- **Add** or **Remove**: Adds the selection to make it part of the cutout or removes the selection from the cutout.
  To add the selection, decide what type of cutout you are adding; **Inclusion** or **Exclusion**. Select the type and click **Add**  .
  To use the selection to remove features from a cutout, select the type of cutout you are removing from (**Inclusion** or **Exclusion**) and click **Remove**  .
  You can use this feature repeatedly to continue adding to and removing from the cutout.



- **Manual edit**: Select the tool and your cursor changes to **Manual Edit**  . With this cursor, click and drag points to modify the cutout.



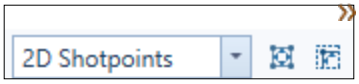
- **Clear cutout**: Clears the entire cutout type. Select the cutout type and then click **Clear cutout**.



- **Undo** and **Redo**: Click to undo or redo your last edit to a cutout.



- **Cutout Details**: Opens the **Cutout Details** window.



- **Snap to**: Use snapping to help set your cutout. Select the snapping layer from the drop down. Then select one of the snapping tools:
  -  Snaps all cutout points to the points of the selected layer.
  -  Snaps selected cutout points to the points of the selected layer.



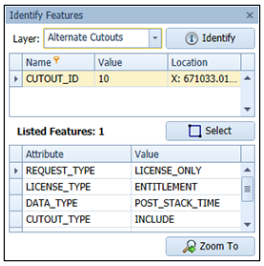
- **Bin grids**: Click to display the bin grids for the survey. Zoom in on the map to view more bin grid detail.



- **Editor Settings**: Click to open the **Editor Settings** window.

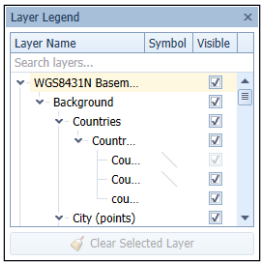


- **Identify**: Identify the features of particular items on the map. Click to activate the **Identify** cursor  . Click and drag to select features to identify. The **Identify Features** window opens with more options.





- **Layers**: Click to open the layers legend. In the layers legend, select and deselect the checkboxes to display different map layers.





- **Pan**: Click and drag to pan the map. Double-click to zoom in slightly.



- **Zoom in**: Draw an area on the map to zoom the view to the specified extent.



- **Zoom out**: Draw an area to quickly zoom out.



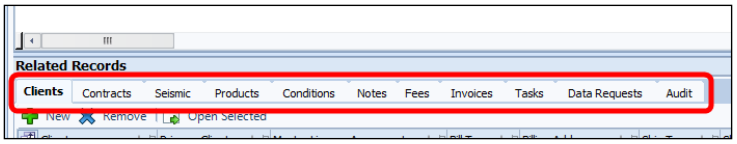
- **Full map**: Click to expand the view to the full extent of the map.



- **Troubleshooting log**: Click to display the technical actions of Exploration Archives. This is useful for your administrator when resolving issues.

Manage Related Records

Information associated to a license selected in the **License Properties** grid displays in the **Related Records** panel.



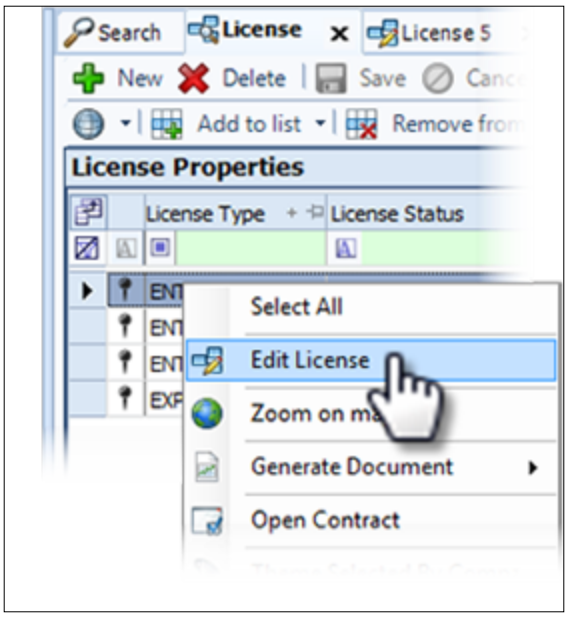
The detail in the **Related Records** tabs is available for editing directly in each tab, with the exception of **Data Request**, **Seismic** and **Products**.

To edit the **Data Request** detail, refer to "Data Request" on page 433.

To add or edit detail in the **Seismic** and **Products** tabs, you must first open the **Editor View**.

To open Editor View...

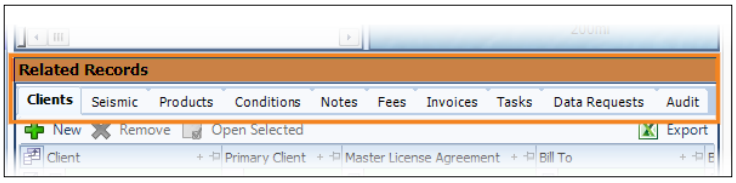
To open the **Editor View**, right-click on the license to open the context menu and click **Edit License**. The **Editor View** opens in a new tab with the **Seismic** and **Products** (and **Cutouts**) detail available for editing. For further detail, refer to "To add a survey:" on page 277 and "Add a cutout" on page 279.



The tabs that allow direct editing include:

- Clients
- Conditions
- Notes
- Fees
- Invoices
- Tasks

Information associated to a license selected in the **License Properties** grid displays in the **Related Records** panel.



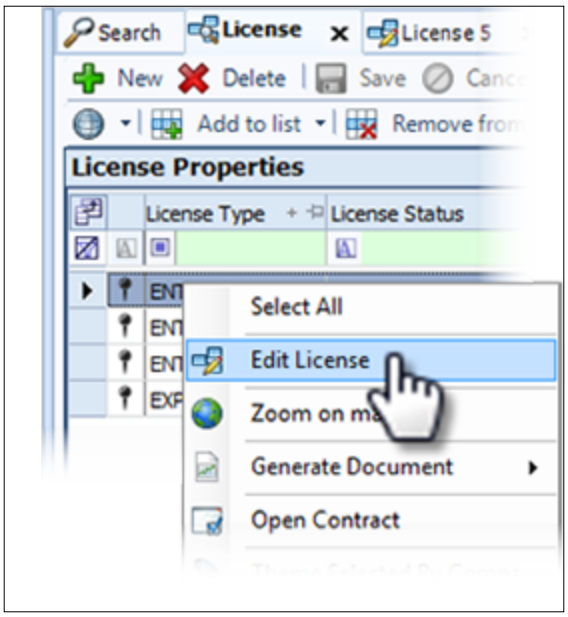
The detail in the **Related Records** tabs is available for editing directly in each tab, with the exception of **Data Request**, **Seismic** and **Products**.

To edit the **Data Request** detail, refer to "Data Request" on page 433.

To add or edit detail in the **Seismic** and **Products** tabs, you must first open the **Editor View**.

To open Editor View...

To open the **Editor View**, right-click on the license to open the context menu and click **Edit License**. The **Editor View** opens in a new tab with the **Seismic** and **Products** (and **Cutouts**) detail available for editing. For further detail, refer to "To add a survey:" on page 277 and "Add a cutout" on page 279.



The tabs that allow direct editing include:

- Clients
- Conditions
- Notes
- Fees
- Invoices
- Tasks

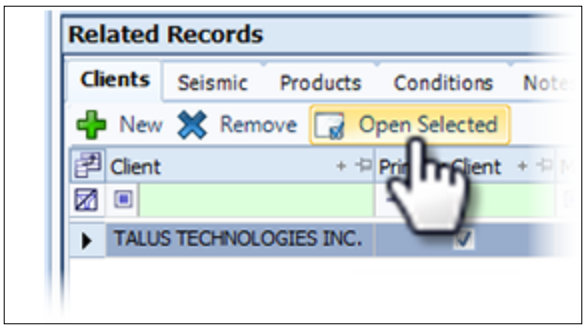
Assign clients to a license

The **Clients** tab of the **Related Records** is directly linked to the records in the **Business Associate** module.

When assigning a Client, the general information automatically generates from the existing business associate (BA) detail.

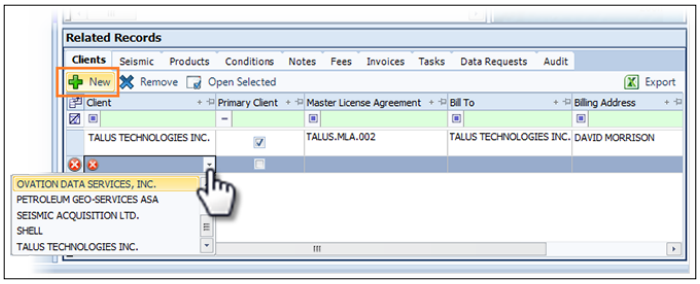
To edit an existing business associate record...

Select the Client in the grid and click **Open Selected**. The business associate record opens in the **Business Associate** module. Edit as required and save.



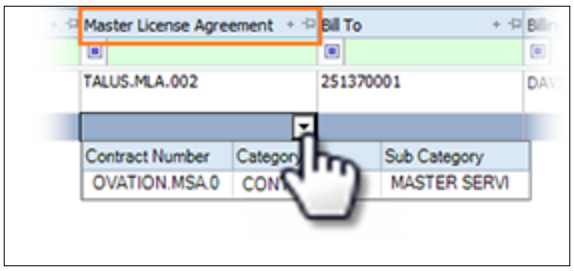
To assign a Client:

1. Open the **Clients** tab and click **New**. A new row adds to the grid.
2. In the **Client** column, click the down arrow to open the list of existing Client records. Locate the target Client and select. The Client name adds to the grid. The options available to select for the other columns become available according to the existing record.

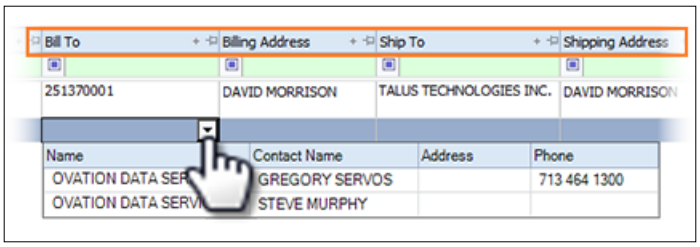


> **Note:**
> If you are adding one Client, select the checkbox in the **Primary Client** column. If you are adding more than one Client, select one of the clients as the **Primary Client**.

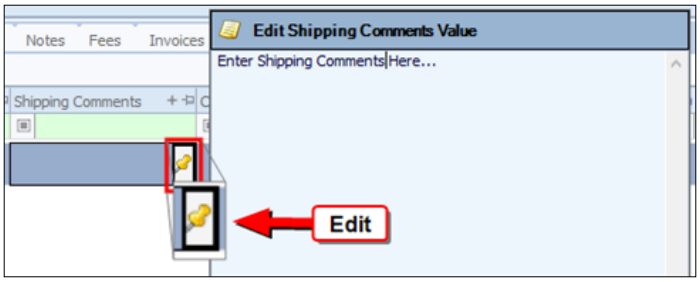
3. In the **Master License Agreement** column, click the down arrow and select the relevant agreement.



1. For the billing and shipping information, click the down arrow and select the correct information from the list.



2. To add additional shipping information, hover over the **Shipping Comments** cell and click the **Edit** icon to open the text entry window.



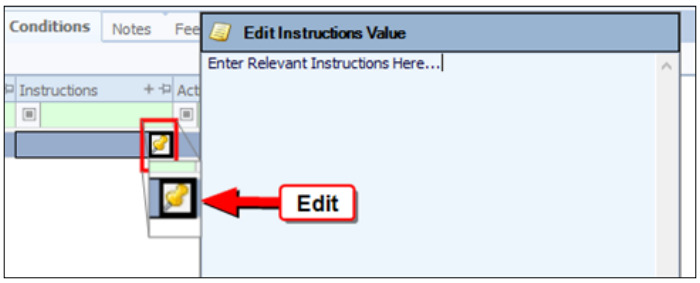
3. Enter the relevant information and click **OK**.
4. Double-click on each of the remaining cells to activate, and enter the contact information, AFE, PO number and references number, as required.
5. When complete, click **Save** in the main toolbar.

Use conditions

The **Conditions** tab is for recording a condition that is associated to a license. Exploration Archives automatically generates a notification reminder to the assignee according to the **Action Date** and **Expiry Date** associated to the condition.

To add a condition:

1. Open the **Conditions** tab and click **New**. A new row adds to the grid.
2. Select the **Condition Type**.
3. Select the **Condition Status**.
4. To enter the instructions, hover over the **Instructions** cell and click edit to open the text edit window.



Enter the instructions and click **OK**.

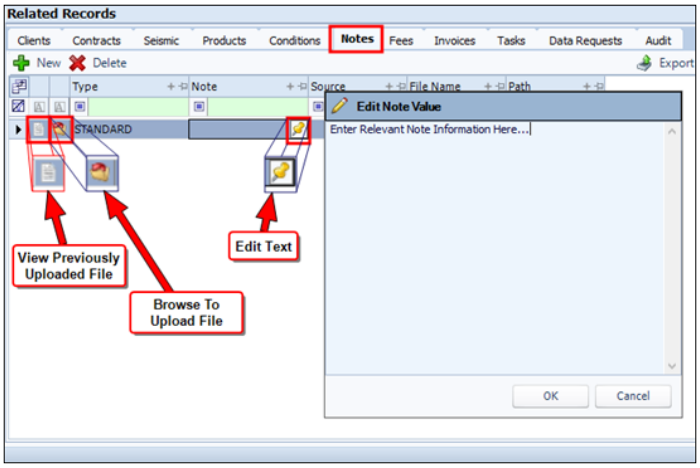
5. Enter the **Action Date** and the **Expiry Date**.
6. Select the responsible person in the **Assigned To** column.
7. Click **Save** in the main toolbar.

Add notes

The **Notes** tab is for adding files and notes to a license.

To add a file or note:

1. Open the **Notes** tab and click **New**. A new row adds to the grid.
2. The leading columns of a row provide the option to click and browse for a file to upload or view a file (if already uploaded).

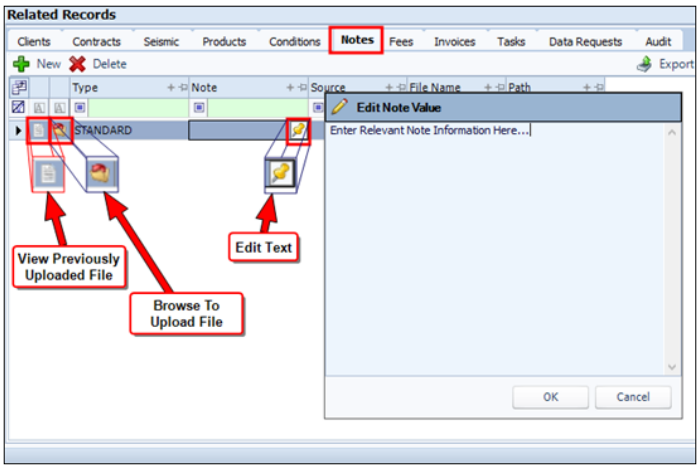


3. If you are uploading a file, click **browse** and locate the file to upload.
4. Select the file and click **Open**. The file loads to the **Notes** grid with the **File Name** and **Path** included.
5. To manually enter a comment or instructions, hover over the **Note** cell and click **Edit Text** to open the text edit window. Enter the note and click **OK**.
6. Click **Save** in the main toolbar.

The **Notes** tab is for adding files and notes to a license.

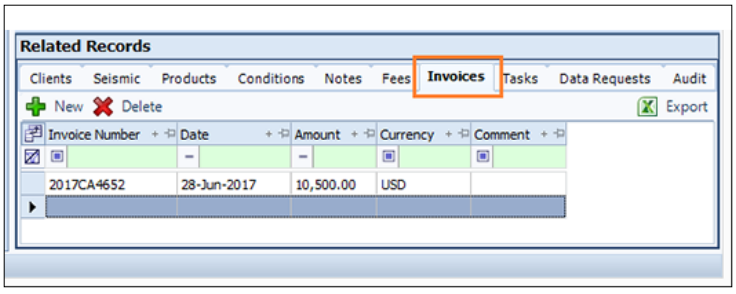
To add a file or note:

1. Open the **Notes** tab and click **New**. A new row adds to the grid.
2. The leading columns of a row provide the option to click and browse for a file to upload or view a file (if already uploaded).
3. If you are uploading a file, click **browse** and locate the file to upload.
4. Select the file and click **Open**. The file loads to the **Notes** grid with the **File Name** and **Path** included.
5. To manually enter a comment or instructions, hover over the **Note** cell and click **Edit Text** to open the text edit window. Enter the note and click **OK**.
6. Click **Save** in the main toolbar.



List invoices

The **Invoices** tab maintains the list of invoices associated to a license. This list is a reference for investigating further information.



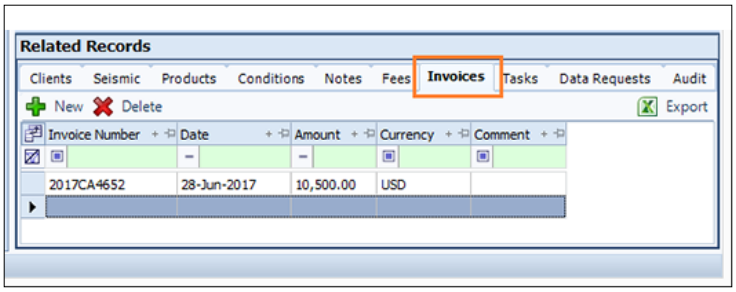
To add a reference to an invoice:

1. Open the **Invoices** tab then click **New**. An empty row adds to the grid.
2. In the **Invoice Number** column, enter the number as it appears on the invoice.
3. Enter the date of the invoice in the **Date** column.

4. Enter the total cost and currency in the **Amount** and **Currency** columns.
5. Double-click the comment cell and manually enter a comment, if applicable.
6. Click **Save** in the main toolbar.

The **Invoices** tab maintains the list of invoices associated to a license. This list is a reference for investigating further information.

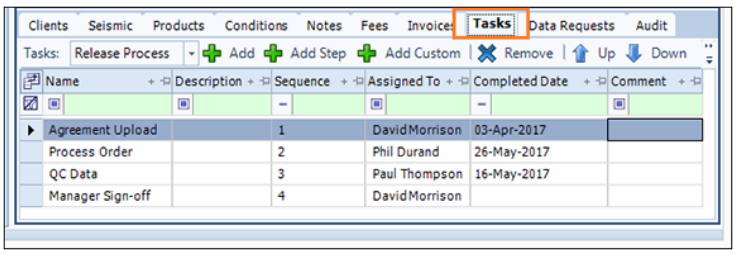
To add a reference to an invoice:



1. Open the **Invoices** tab then click **New**. A new row adds to the grid.
2. In the **Invoice Number** column, enter the number as it appears on the invoice.
3. Enter the date of the invoice in the **Date** column.
4. Enter the total cost and currency in the **Amount** and **Currency** columns.
5. Double-click the comment cell and manually enter a comment, if applicable.
6. Click **Save** in the main toolbar.

Create tasks for a license

The **Tasks** tab for the License module is in the **Related Records** area.



Tasks provide visibility for managing user tasks. Users with permission can create and assign tasks as required for the catalog session data request.

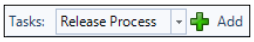
Tasks for a typical catalog session data request are available in the predefined task list. Adding a predefined task, generates a list of the required steps to complete the catalog session data request. Using the toolbar, add, remove and reorder the steps as needed.

Use the **Add custom** option for creating a custom steps. Use the **Description** field to add details of a task. In the **Assigned To** column, assign each task to the responsible party.

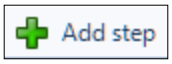
After completing a task step, the assigned user enters a date in the **Completed Date** column. To log additional information associated to a task step, the assignee can use the **Comment** column.

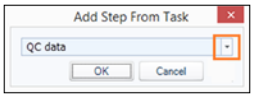
The **Tasks** feature automatically sends a notification to the assigned user in accordance with the system trigger. For example, the system may be configured to keep the task on hold until the catalog session data request is at a particular status. Once the first step is triggered, notifications send sequentially as each step is completed. Setting the completion date for task step triggers the notification for the next step.

Tasks toolbar functionality:



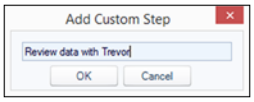
- **Add**: Adds a task that includes a sequence of predefined steps. In the **Tasks** field, click the down arrow to view the tasks options. Select a tasks and click **Add**. The set of steps required to complete the task adds to the grid.



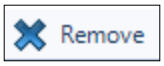


- **Add step**: Adds an individual step from the predefined tasks. In the **Tasks** tab, from the **Tasks** field in the toolbar, select the task that has the target step. Click **Add Step** and the **Add Step From Task** window opens. Click the down arrow and select the associated step. Click **OK**. The task step adds to the grid.





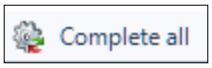
- **Add custom**: Adds a custom step. Click **Add custom** to open the **Add Custom Step** window. Click in the entry field and enter a name for the step. Click **OK**.



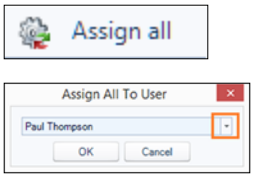
- **Remove**: Removes a step from the grid. Select the step in the grid. Click **Remove**. The step instantly removes from the grid.



- **Up** and **Down**: Moves the task up or down in the sequence order. Select the task and click **Up** or **Down** to move the task step to a new location in the sequence. The task moves in the grid and the number in the **Sequence** column changes accordingly.



- **Complete all**: Adds the current date to the **Completed Date** column for all tasks. Click **Complete all** and current date instantly adds to the **Completed Date** column.

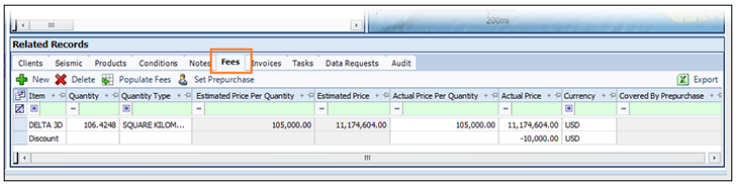


- **Assign all**: Assigns all task steps to one individual. Click **Assign all** to open the **Assign All to User** window. Click the down arrow and select the assignee. Click OK. The **Assigned To** column updates for all task steps with the specified assignee name.
- To assign individual task steps, select the assignee using the drop-down menu in the **Assigned To** column.

Manage fees

The License module uses built-in algorithms to calculate fees. The fees are based on the length, area or blocks cut from a survey for the license. The fees calculate using the price set at the seismic survey level for the particular survey.

The **Fees** tab of the **Related Records** area populates the length, area or blocks according to the cutout and the price as specified for the survey.



The **Fees** tab includes the option to cover the fees using a prepurchase amount, if the client has an existing prepurchase contract. A prepurchase contract must be registered to the client using the Business Associate module.

Features available for managing license fees:

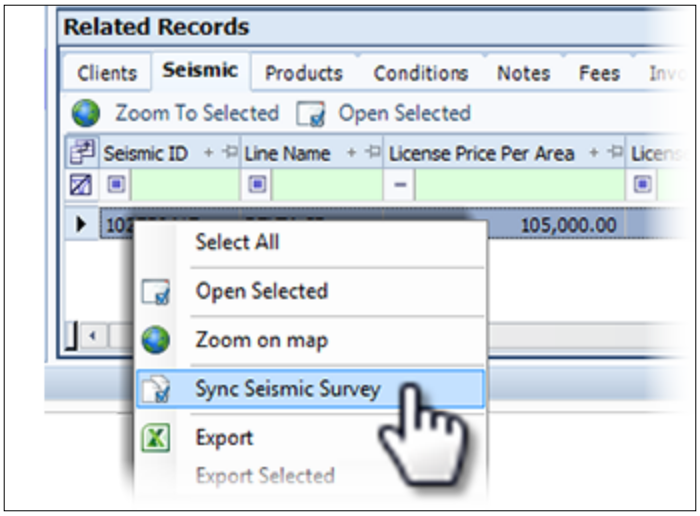
- Calculating fees
- Adding a custom fee
- Using a prepurchase

Calculate fees

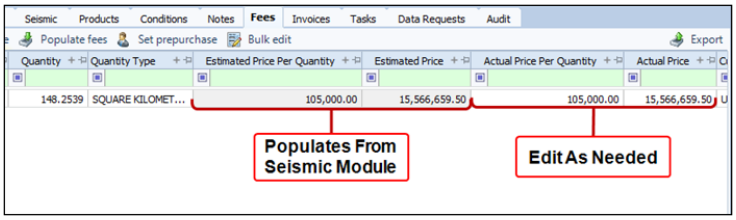
The Fees tab of the Related Records area provides an auto-calculation tool to populate license fees. The price used for calculating the fees must pre-set in the Seismic module. Be sure to sync the seismic survey with the license to ensure the license obtains the current pricing.

To sync the seismic survey...

In the **Related Records** area of the License module, open the **Seismic** tab. Right-click on the seismic record and select **Sync Seismic Survey**. All license-related columns for the survey update to the current information.



To populate fee, click **Populate Fees** . The values for the related columns in the **Fees** tab automatically display.

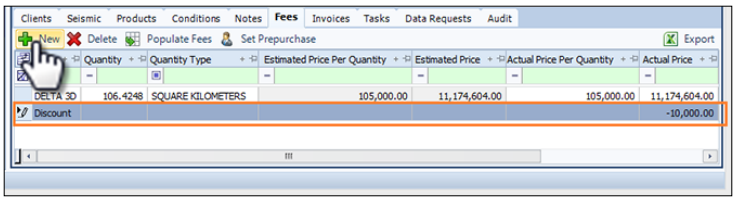


The **Estimated Price Per Quantity** column populates the price as set from the Seismic module. The quantity multiplied by the price displays in the **Estimated Price** column. The estimated values replicate to populate the **Actual Price Per Quantity** and the **Actual Price**. The *actual* values are open for editing as required.

Add a custom fee

The **Fees** tab includes the option of creating a custom fee entry.

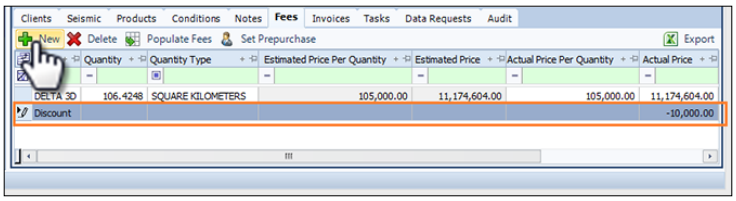
To create a custom fee:



1. Click **New**. A new row with empty cells adds to the grid.
2. Double-click a cell to enter new information.
3. Click **Save** in main toolbar.

The **Fees** tab includes the option of creating a custom fee entry.

To create a custom fee:



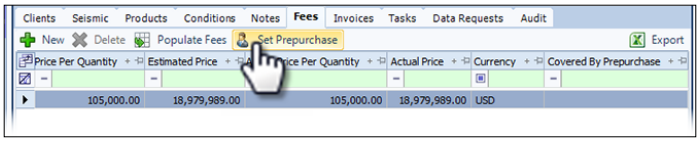
1. Click **New**. A new row with empty cells adds to the grid.
2. Double-click a cell to enter new information.
3. Click **Save** in main toolbar.

Use a prepurchase

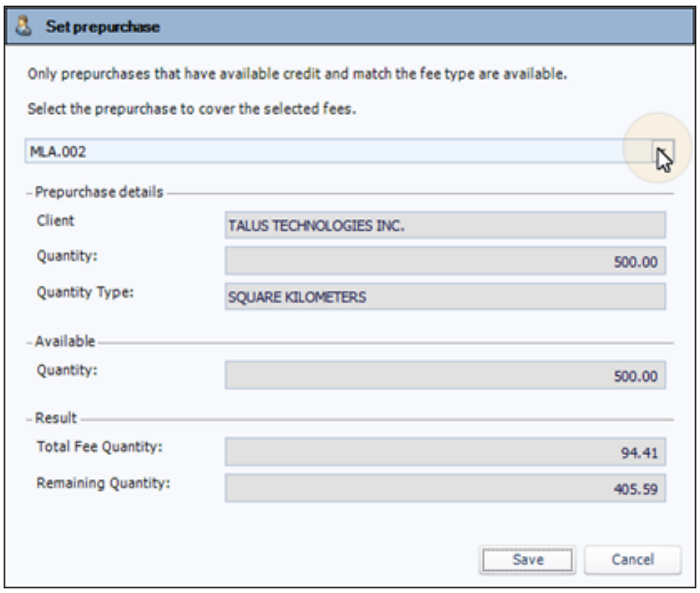
The **Fees** tab in the License module includes the option to cover the fees using a prepurchase amount. The prepurchase contract details must be registered with the primary client in the Business Associate module.

To set the prepurchase:

1. In the **Fees** tab, select the item applicable for the prepurchase.



2. Click **Set Prepurchase**. The **Set Prepurchase** window opens.

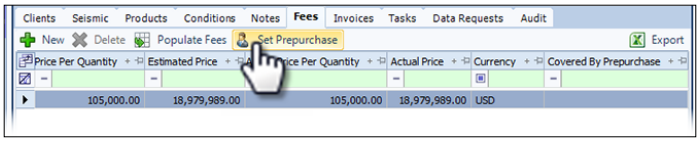


3. In the top field, click the down arrow and select the prepurchase to apply to the license. The associated information displays as a preview in the **Prepurchase Details**, **Available** and **Result** areas.
4. Click **Save**. The windows closes and the calculated amount displays in the **Covered By Prepurchase** column.

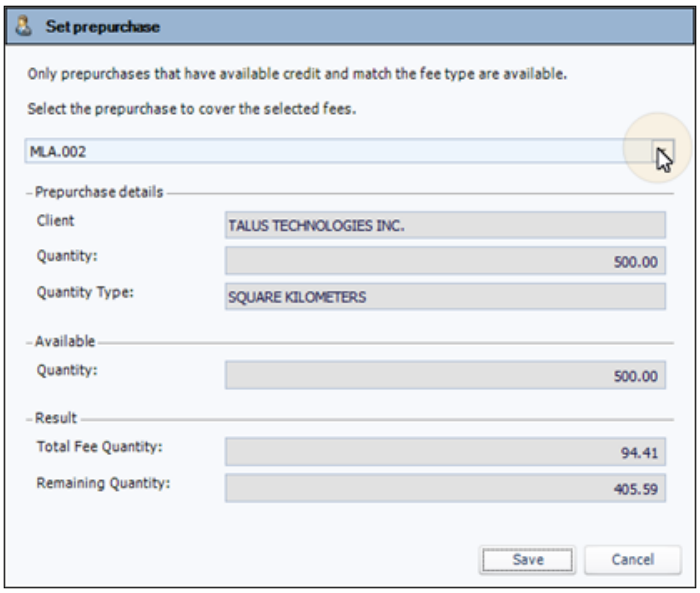
The **Fees** tab in the License module includes the option to cover the fees using a prepurchase amount. The prepurchase contract details must be registered with the primary client in the Business Associate module.

To set the prepurchase:

1. In the **Fees** tab, select the item applicable for the prepurchase.



2. Click **Set Prepurchase**. The **Set Prepurchase** window opens.



3. In the top field, click the down arrow and select the prepurchase to apply to the license. The associated information displays as a preview in the **Prepurchase Details**, **Available** and **Result** areas.
4. Click **Save**. The windows closes and the calculated amount displays in the **Covered By Prepurchase** column.

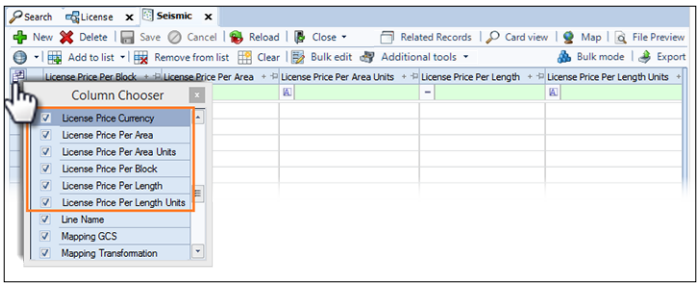
Set license price

Note:
The License module includes a calculation tool that populates license fees for seismic that is for sale. The fees calculate according the prices set for the survey in the Seismic module.

To set the license price:

1. Select the record in the Seismic module.
2. Locate the license price columns in the main grid.

Note:
If the license price columns are not in the grid, use the **Column Chooser** to add them. Click the column chooser icon (upper left corner of the grid) to open the list of available columns. Drag and drop the license columns from the **Column Chooser** to the grid.



3. Enter the license price details for each column, as applicable:

> **Note:** When entering values that require a decimal amount you need to type the decimal.

Licence Price Currency	This is a drop-down list where you can select the currency the License Price is in.
License Price Per Area	Double-click in this cell to enter an amount that reflects the cost of the license per area.
License Price Per Area Units	This field is a drop-down list that allows you to select the units of measurement for the License per Area.
License Price Per Block	Double-click in this cell to enter an amount for the License price per block of land.
License Price Per Length	Double-click in this cell to enter an amount for the License price per length of land.
License Price Per Length Units	This is a drop-down list that lets your select the units of measurement

4. Click **Save**.

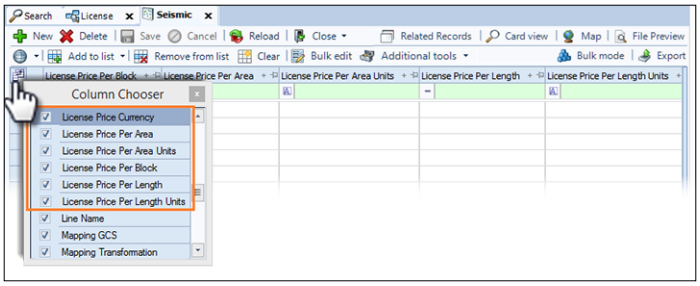
The License module includes a calculation tool that populates license fees for seismic that is for sale. The fees calculate according the prices set for the survey in the Seismic module.

To set the license price:

1. Select the record in the Seismic module.
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>
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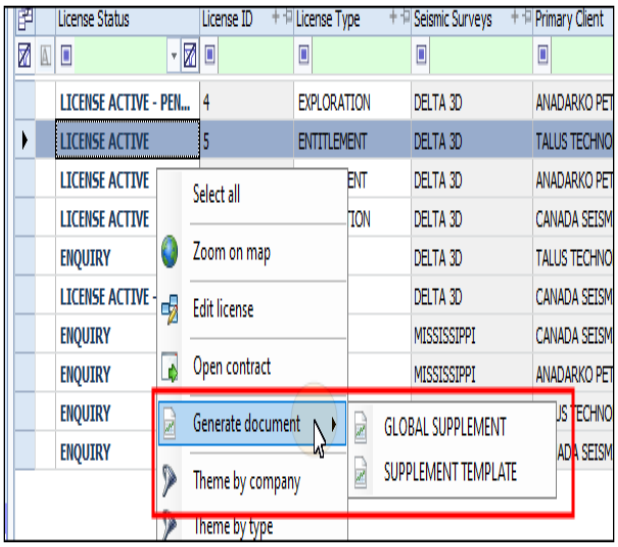
4. Click **Save**.

Generate documentation

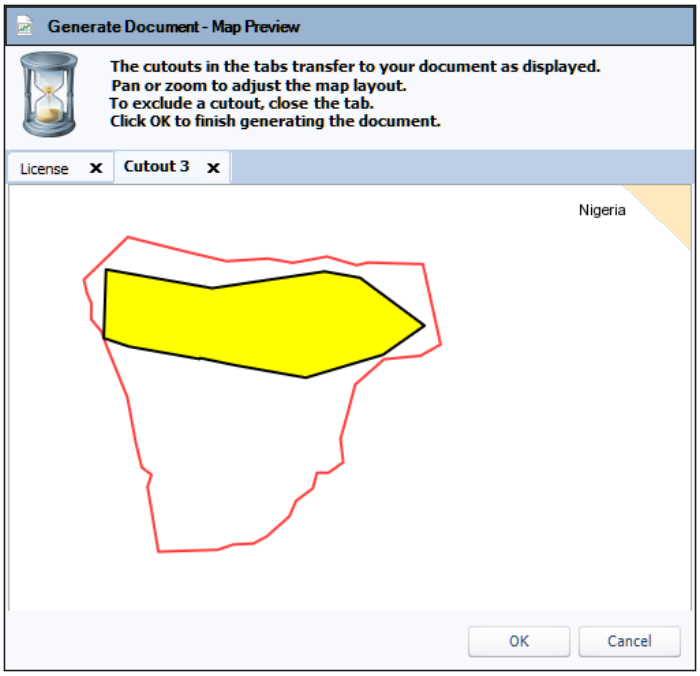
The document tool in the License module generates license-related documentation specific for your company. The templates use database tags to populate information into an editable Word document. Potential templates available may include License Contract, Data Delivery Details, Standard License Agreement, X,Y Listing, Data Request Details and any other custom configured template.

To generate a document:

1. Open the License module and locate the target license in the **License Properties** grid.
2. Right-click on the target license to open the context menu. Point to **Generate document** and thenbselect the template to use to generate the document.



A preview of the associated map images open in a new window.



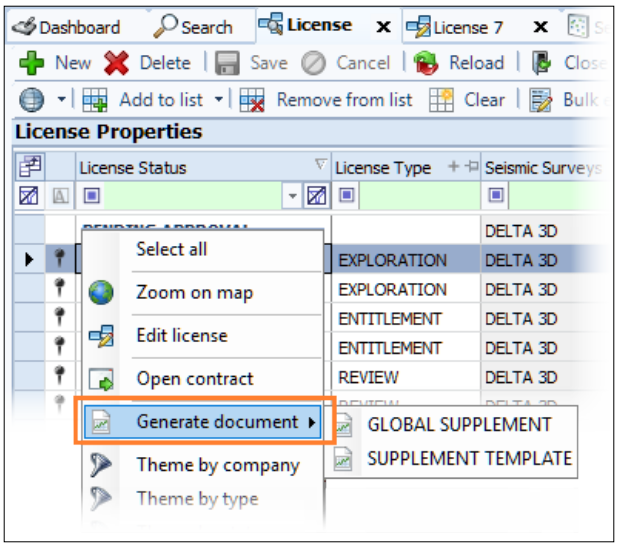
3. In the preview window, the license and cutouts display in the tabs. Click each tab to view the images. Pan or zoom to edit the display of the image as appropriate. To omit an image from the document, click the X to close the tab.
4. To generate the document, click **OK**. Microsoft Word opens with the license and cutout images and any other database tags as specified for the template. Edit as required.

The document tool in the License module generates license-related documentation specific for your company. The templates use database tags to populate information

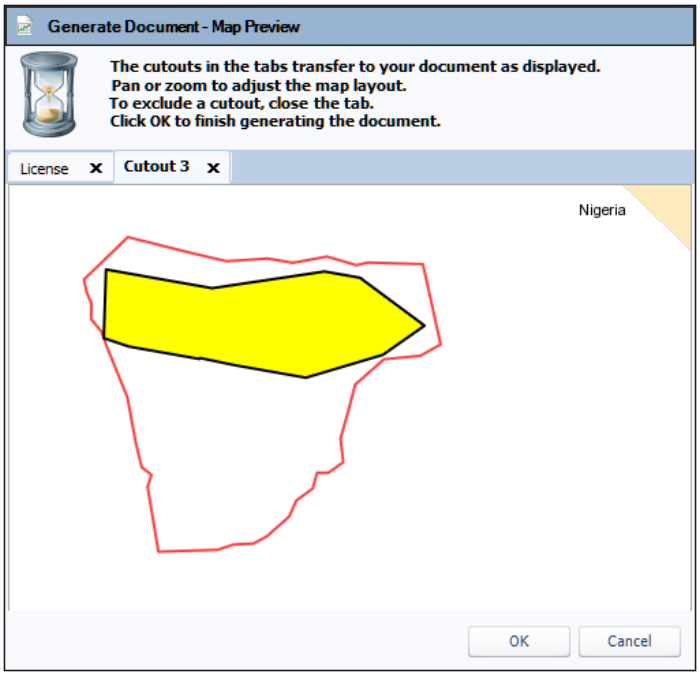
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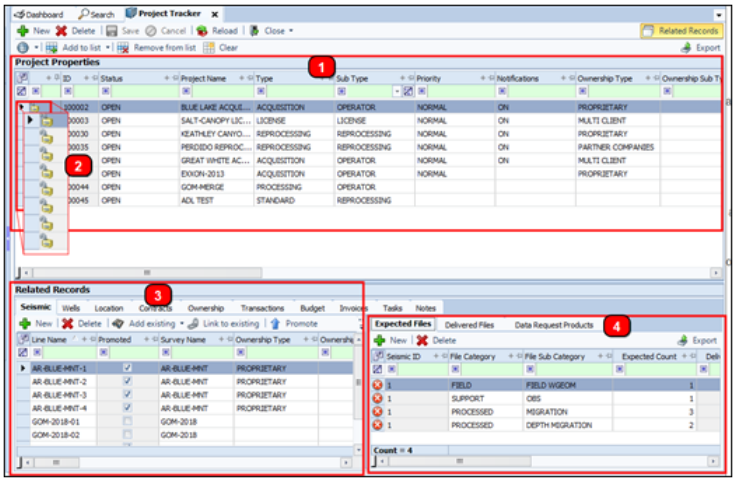
3. In the preview window, the license and cutouts display in the tabs. Click each tab to view the images. Pan or zoom to edit the display of the image as appropriate. To omit an image from the document, click the X to close the tab.
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4.2 Project Tracker

Project Tracker provides complete visibility for organizing and monitoring seismic projects including acquisitions, licenses, processing and other custom types specific to your company requirements.

Project Tracker provides quick linking to existing data and cross-module updating.

Understanding the screen layout



1. **Project Properties**: This grid lists each project with associated detail in various columns.
2. **Soft Lock**: Project Tracker incorporates a soft-lock feature that prevents simultaneous editing from more than one user,.

   The leader column of a row displays the lock status for the project.

   - An unlocked project is available for you to edit details in the **Project Properties** grid or the **Related Records**.
   - When you begin to edit an unlocked project, you obtain the lock and others see that the project has a soft-lock.
3. **Related Records**: Displays the data details and administrative information regarding a selected project.
4. The **Seismic** tab in the **Related Records** panel includes a secondary panel for monitoring the progress of the project deliverables.

   This Panel is divided into the following tabs:

- **Expected Files**: A list of files that are expected to be delivered for the selected seismic.
- **Delivered Files**: The Delivered files tab will list files in the linked "Catalog" on page 327. When the session is set to Uploaded, users can edit the details with **Edit Workstation**
- **Data Request Products**: This grid displays all the items from Data Requests.

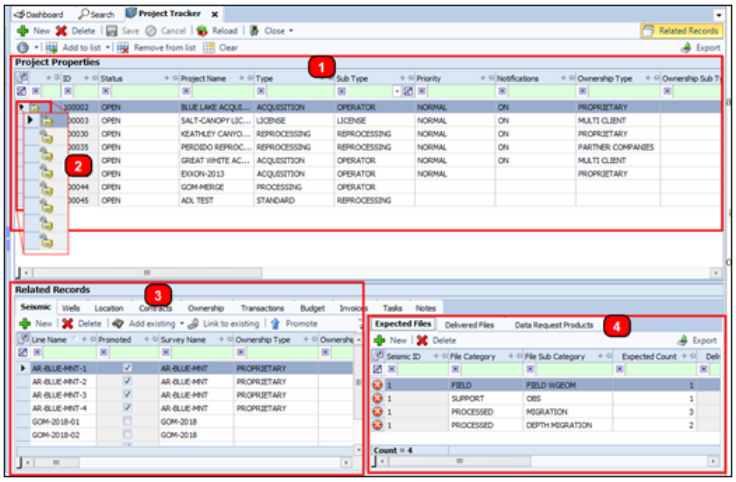
Project Tracker provides complete visibility for organizing and monitoring seismic projects including acquisitions, licenses, processing and other custom types specific to your company requirements.

Project Tracker provides quick linking to existing data and cross-module updating.

New in this version:

- Added a tool to allow adding of an existing Contract to a Project.
- Added an Import tool for expected files and expected media.

Understanding the screen layout



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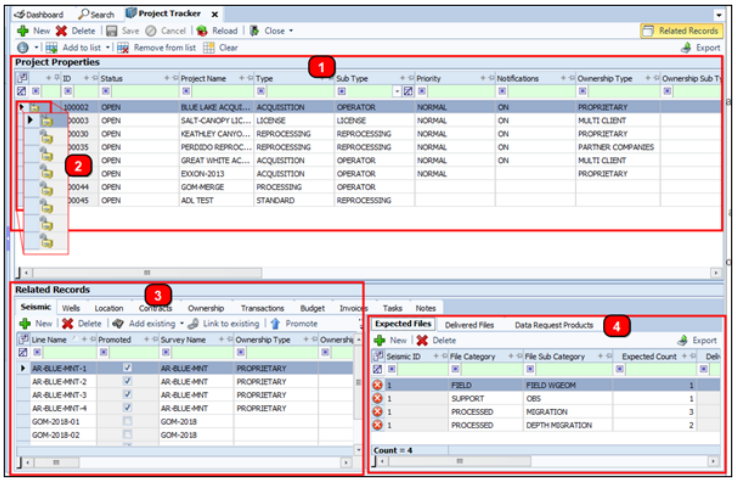
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   This Panel is divided into the following tabs:

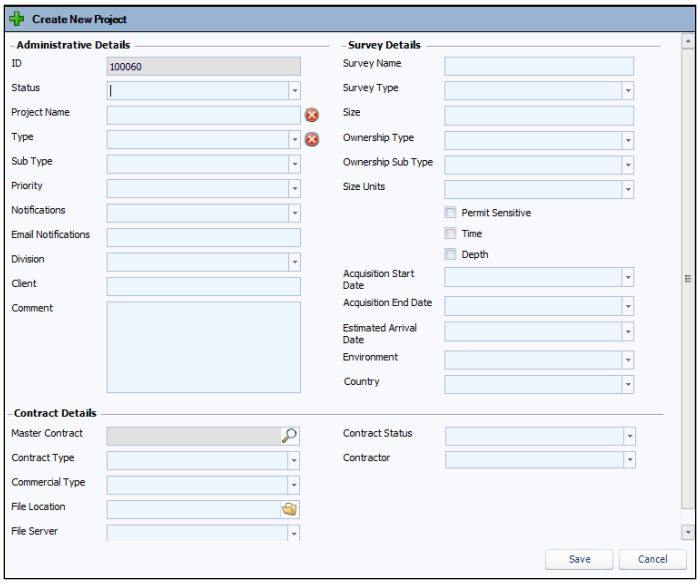
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   - **Data Request Products**: This grid displays all the items from Data Requests.

Create a new project

Creating a project begins when you receive a contract and have the initial details. Using the details you receive with the contract, you can create a project and enter the logistics in the **Project Properties** grid. After entering the project properties, you can add preliminary information in the **Related Records** area, and edit as the project progresses.

To create a new project and enter the project properties:

1. Open **Project Tracker** and click **New**The **Create New Project** window opens.



2. Select a **Status** for the project and enter a **Project Name**.
3. Select the project **Type**.

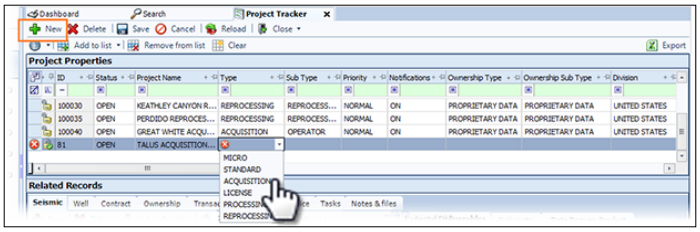
> **Note:**
> Status and Project name are required fields

4. Enter the remaining information for each field as applicable.
5. Click **Save**.

Creating a project begins when you receive a contract and have the initial details. Using the details you receive with the contract, you can create a project and enter the logistics in the **Project Properties** grid. After entering the project properties, you can add preliminary information in the **Related Records** area, and edit as the project progresses.

To create a new project and enter the project properties:

1. Open **Project Tracker** and click **New**. A new row adds to the **Project Properties** grid with an auto-generated **ID**.
2. Select a **Status** for the project and enter a **Project Name**.
3. Select the project **Type**.



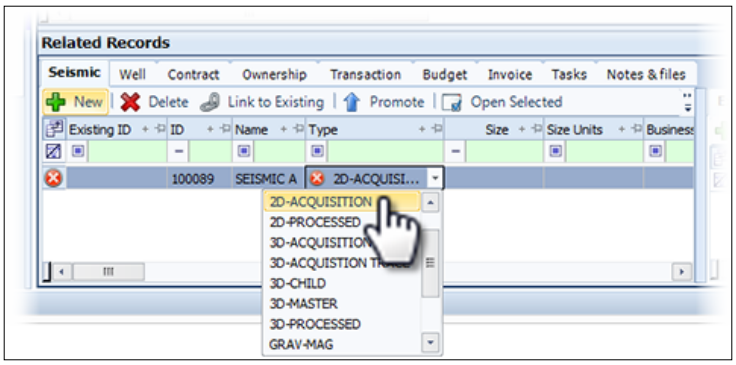
4. Enter the remaining information for each column as applicable.
5. Click **Save**.

Continue by adding the relevant **Related Records** information.

Add seismic to a project

Project Tracker accommodates workflows for adding new seismic or adding existing seismic to a project.

To add new seismic record through Project Tracker:



1. In the **Related Records** panel, click **New**.

   A new row adds to the grid with an auto-generated ID. The new ID is a project-specific ID for the seismic.
2. Enter a **Name**.
3. Enter the remaining information for each column as applicable.
4. Click **Save**.

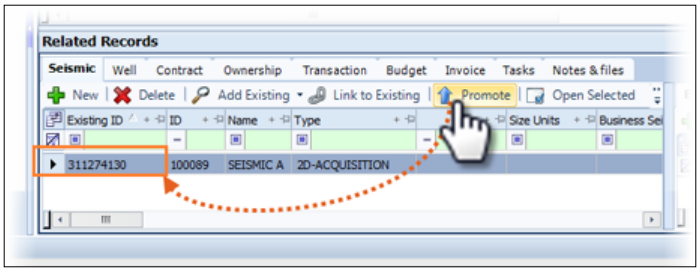
   Clicking **Save**, saves the detail to the **Seismic** tab of the **Related Records**.

At this point, the detail is on hold until you promote the seismic to the database or link the seismic to an existing record.

To promote new seismic to production:

The **Promote** action generates a **Seismic ID** and makes the record available in the **Seismic** module.

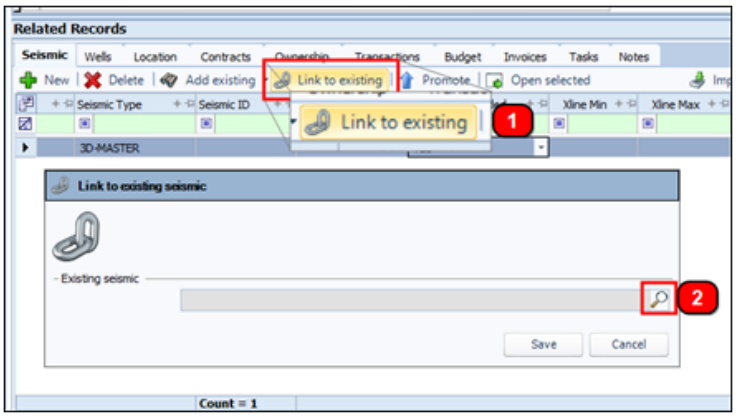
1. Select the seismic and click **Promote**.



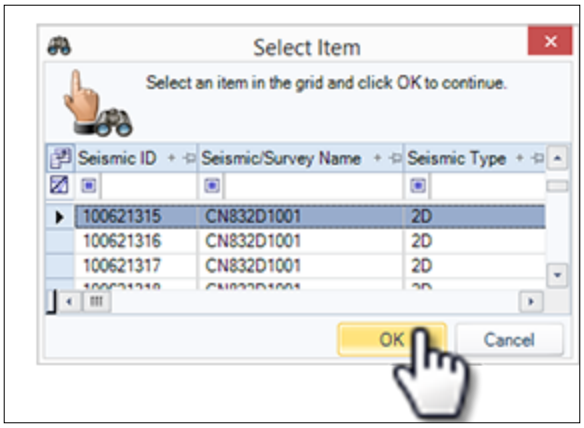
2. In the confirmation window, click **Yes**. A seismic ID auto-generates for the new seismic.

To link new seismic to existing:

After creating a seismic record in Project Tracker, you can link the record to seismic that already exists in Exploration Archives.



1. Select the seismic and click **Link to Existing**. The **Link to Seismic** window opens.
2. To find the existing seismic, click **search** and select a search option.
3. When the search window opens, enter your search criteria and click **Search**. The results open in the **Select Item** window.
4. Select the linking seismic and click **OK**.



The **Select Item** window closes and the selected seismic ID displays in the **Link to Seismic** window.

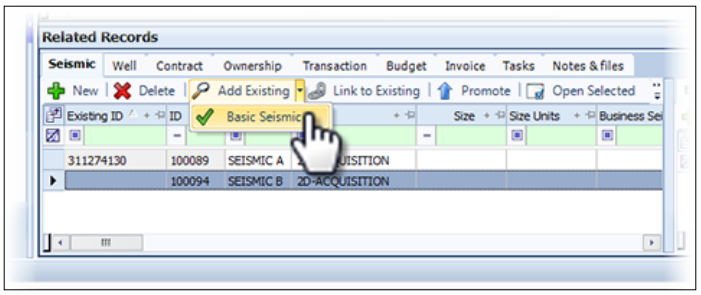
5. Click **Save**. The seismic ID displays in the **Seismic ID** column of the **Seismic** tab and the seismic record is linked to the existing seismic.

Add existing seismic to a project

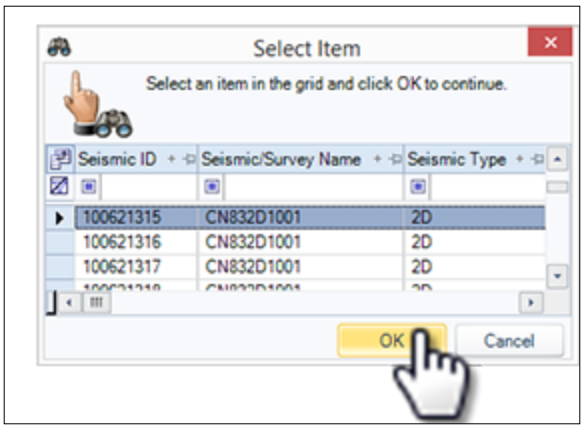
Project Tracker accommodates workflows for adding new seismic or adding existing seismic to a project. The **Add Existing** option provides search functionality to locate the existing seismic.

To add existing seismic to a project:

1. In the **Related Records** section, click the down-arrow of **Add Existing** and select a search.



2. When the search window opens, enter your search criteria and click **Search**. The results open in the **Select Item** window.
3. Select the seismic to add to the project and click **OK**.

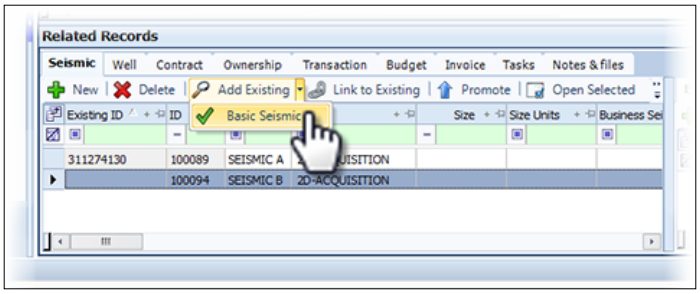


   The **Select Item** window closes and the selected seismic adds to the **Seismic** tab of the **Related Records**.
4. Click **Save**.

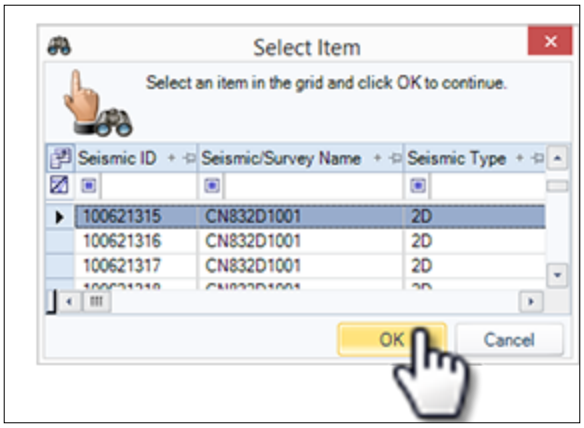
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2. When the search window opens, enter your search criteria and click **Search**. The results open in the **Select Item** window.
3. Select the seismic to add to the project and click **OK**.



The **Select Item** window closes and the selected seismic adds to the **Seismic** tab of the **Related Records**.

4. Click **Save**.

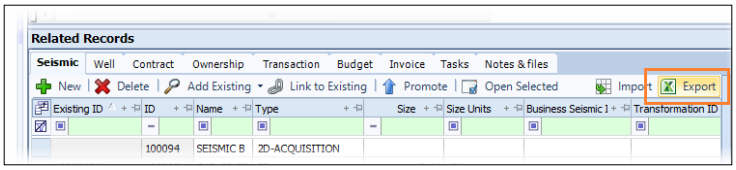
Importing seismic detail using Excel®

To add multiple seismic records to a project, import the records using Excel.

Importing with Excel requires specific formatting for the detail to import correctly to Exploration Archives.

You can create the template directly from the Project Tracker module.

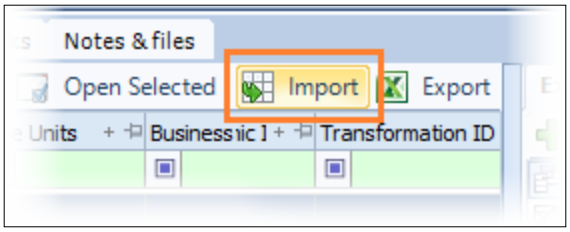
To create a template for importing, open the **Seismic** tab of **Related Records** and click **Export**.



Save the file and add the seismic information to be imported.

To import seismic using an Excel spreadsheet:

1. Open the **Seismic** tab of **Related Records** and click **Import**.



2. Navigate to the Excel file and select.
3. Click **Open**. The seismic records add to the grid in the **Seismic** tab.
4. Click **Save**.

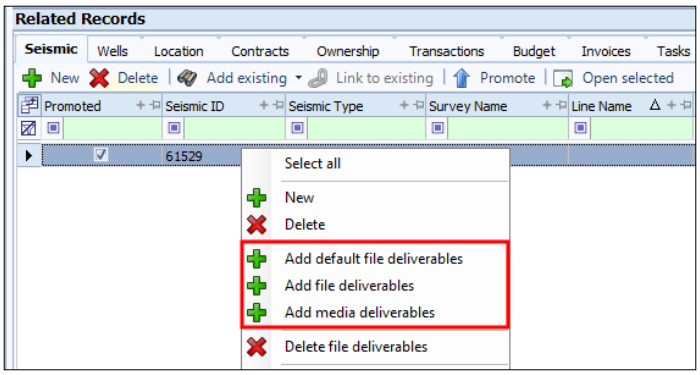
Add Deliverables

Once you have a Seismic attached to a project, you can attach deliverables.

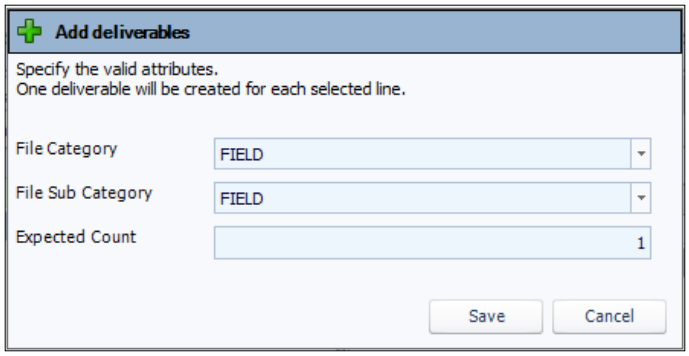
To attach deliverables use one of the following methods:

Use the Context Menu

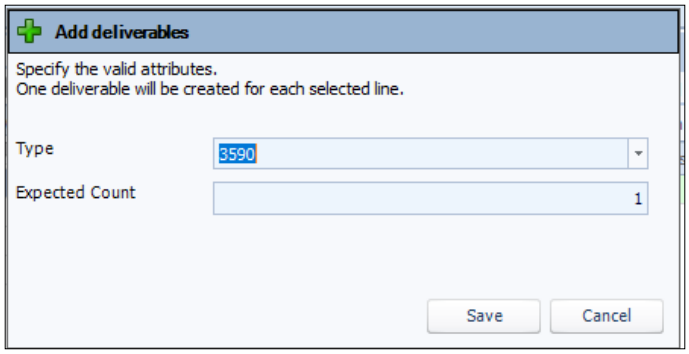
1. In the Related Records panel select the seismic record in the Seismic tab.
2. Right-click and select one of the deliverables options:



- **Add default file deliverables** : This option adds the deliverables that have been configured to be automatically added to the expected files tab.
- **Add file deliverables**: Select this option to open the Add deliverables dialogue.



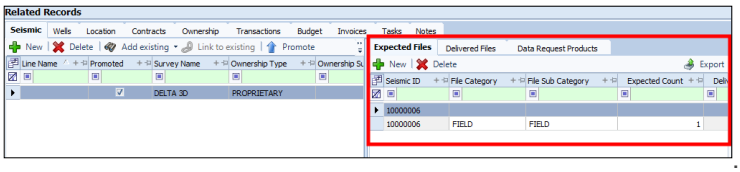
- Click **Save**.
- Select the **File Category** and **File Sub Category**. Also enter the **Expected Count**.
- **Add media deliverables**: Select this command and the Add deliverables dialogue opens.



Select the Type from the drop-down list and enter the Expected Count.

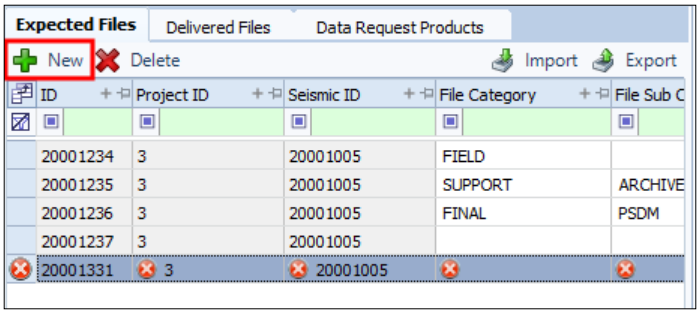
- Click **Save**.

As deliverables are configured and saved you will notice that the deliverables will appear in the **Expected Files** tab that appears when a seismic is selected.



Attach a Deliverable on the Grid

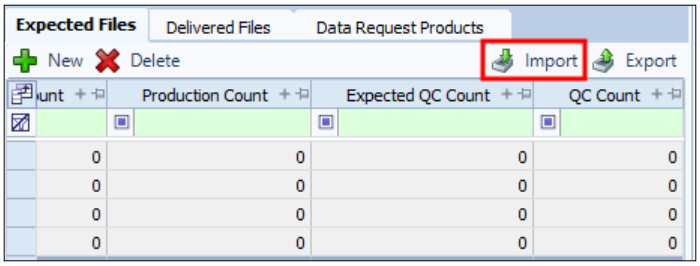
1. Select a Seismic record in the Related Records panel.
2. In the Expected Files tab, click **New**.



3. In the empty row that appears, enter each column from the drop-down lists or enter a value by double-clicking and typing in the cell.
4. When complete, click **Save** on the toolbar.

Import Expected Files from an Excel File

1. In the Expected Files tab, click **Import**.



2. In the File Explorer, navigate to the Excel file and select it.

> **Note:**
> The Excel file must have valid column names, such as database column name, property name, and caption. The Import will also look for the "File Category" and "File Sub Category"

3. Click **Open**.

   Before the import is complete, the following validation will happen:

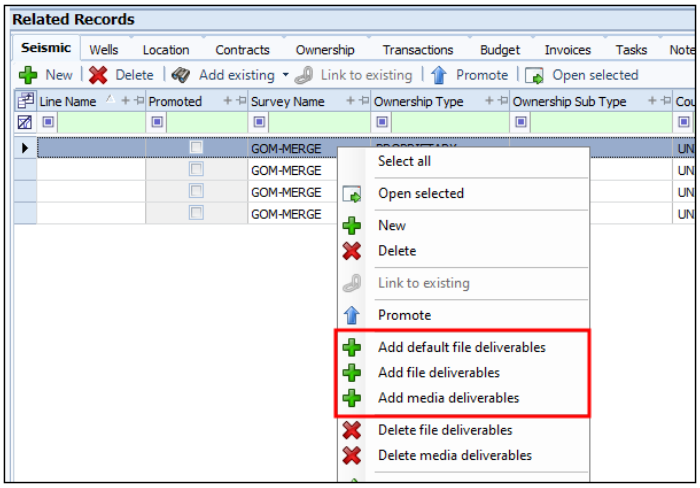
- When importing files, the category and sub-category must exist in the database. The sub-category must also be valid for the specified category.
- When importing media, the media type must exist in the database.

4. When the import complete, click **Save** on the toolbar.

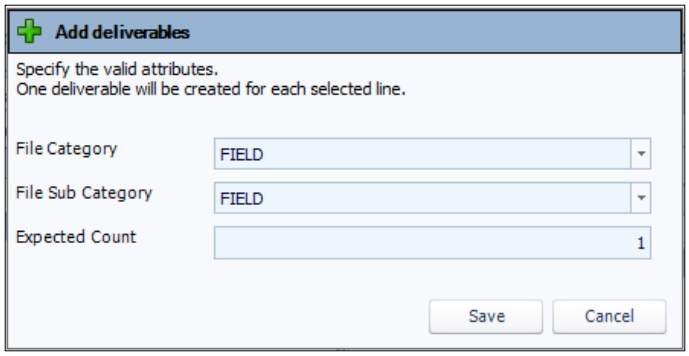
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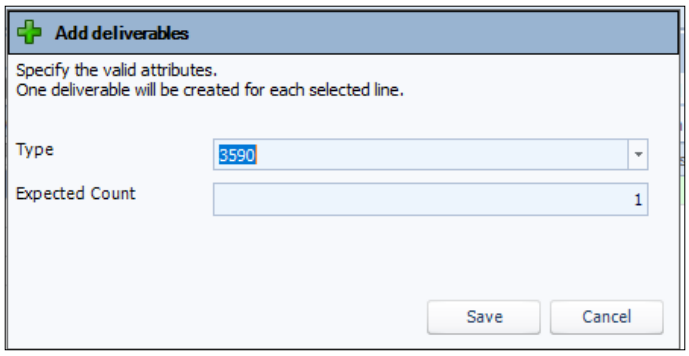
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2. Right-click and select one of the deliverables options:



- **Add default file deliverables** : This option adds the deliverables that have been configured to be automatically added to the expected files tab.
- **Add file deliverables**: Select this option to open the Add deliverables dialogue.



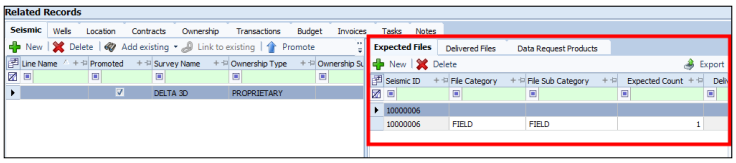
- Select the **File Category** and **File Sub Category**. Also enter the **Expected Count**.
- **Add media deliverables**: Select this command and the Add deliverables dialogue opens.



Select the Type from the drop-down list and enter the Expected Count.

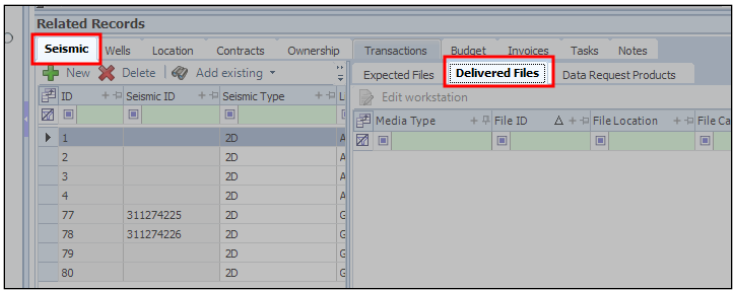
» Click **Save**.

As deliverables are configured and saved you will notice that the deliverables will appear in the **Expected Files** tab that appears when a seismic is selected.



Delivered Files Tab

The Delivered Files tab is located in the secondary panel when the Seismic tab is selected in the related tab.

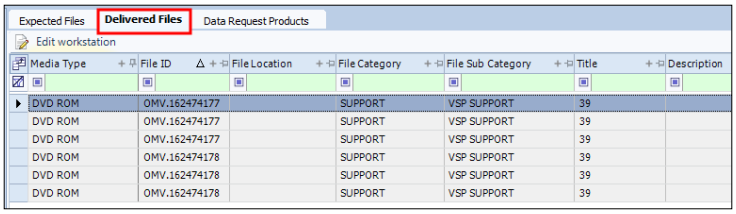


The Delivered Files tab will list files in a linked catalog session. When the catalog session is set to Uploaded, users can edit the details in **Edit Workstation**

For more information about Catalog Sessions refer to "Catalog" on page 327

> **Note:**
> In order for the files to be counted, the Seismic ID must match, also the File Category and File Sub Category from the Project module

The Delivered Files tab is located in the secondary panel when the Seismic tab is selected in the related tab.



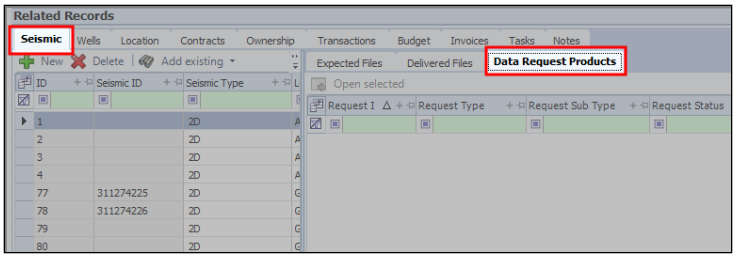
The Delivered Files tab will list files in a linked catalog session. When the catalog session is set to Uploaded, users can edit the details in **Edit Workstation**

For more information about Catalog Sessions refer to "Catalog" on page 327

> **Note:**
> In order for the files to be counted, the Seismic ID mustmatch, also the File Category and File Sub Category from the Project module

Data Request Products

The **Data Request Products** tab is attached to the Seismic tab in the related records panel.



This tab lists the products attached to the seismic from a Data Request. See: "Data Request" on page 433.

The Data Request Products tab is attached to the Seismic tab in the related records panel.

This tab lists the products attached to the seismic from a Data Request. See: "Data Request" on page 433.

Add a contract

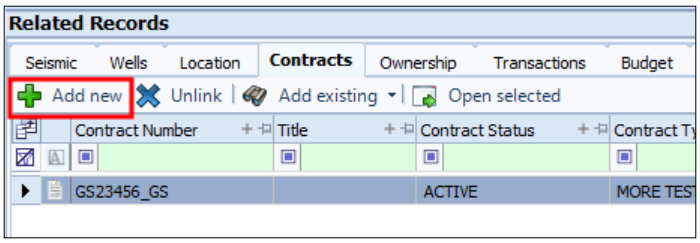
Depending on your company workflow, contract files can be added from the **Project Tracker** module or from the **Contract** module.

> **Note:**
> Before adding the contract, you must have at least one seismic record ready to link to the contract.

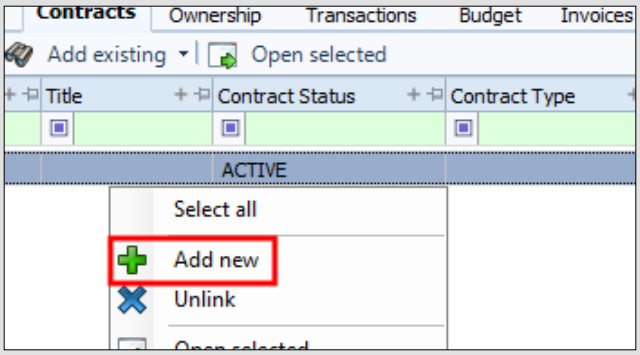
To add a new contract in Project Tracker use one of the following 2 methods:

Create a New Contract:

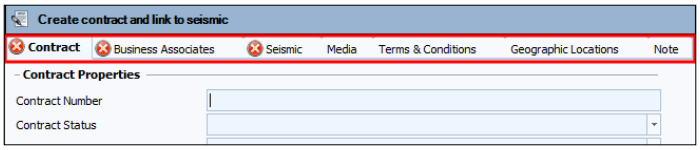
1. In the Related Records panel, select the Contracts tab.
2. Click **Add New**.



Tip:
Alternatively, you can right-click anywhere in the Contract grid to open the context menu then click **Add New**.



3. The **Create contract and link to seismic** window opens with several tabs available for entering associated information.

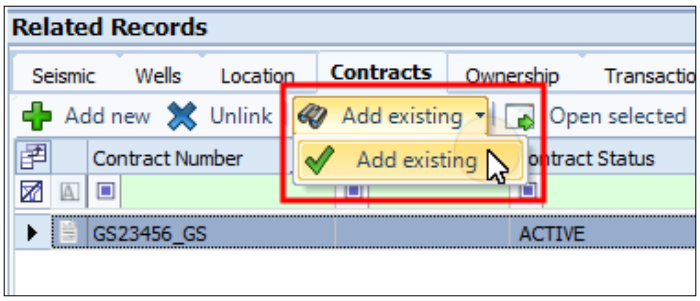


Each tab has a specific function

- **Contract**: you enter the Information about the contract. Mandatory fields are Highlighted with an X. The Contract tab is required to be filled out before you save.
- **Business Associates**: See: "Assign or add a business associate" on page 213
- **Seismic**: See: "Linking seismic to a new contract" on page 214
- **Media**: See: "Add the contract media " on page 224
- **Terms and Conditions**: This tab allows you to attach Terms and Conditions to the contract. See: "Add Terms and Conditions" on page 220
- **Geographic Locations**: You can add different Geographic Locations . See: "Add Geographic Locations" on page 222
- **Note**:See: "Add a note with a contract" on page 224

Add an Existing Contract

1. In the Related Records panel, select the Contracts tab.
2. Click **Add Existing** from the drop-down.



3. In the Search Database Records window, enter your search criteria, then click **Search**.
4. From the search results, click on the contract or contracts to add, then click **OK**.



4.3 Catalog

The **Catalog** module is for adding products and linking to a seismic record in Exploration Archives.

New in this version:

- Enhancements to **Smart Parse** to aid with Machine Learning (ML).
- Added a Catalog Status Lock for multiple users
- Added **Export to Shape File**
- Updated the logic for Catalog duplicate check.

New in this version:

- Improved File and Media grid filters to allow multi-select of sub-filtered Seismic list.
- Improved the “Create import template” tool such that the resulting Excel file now includes pick-lists.
- Updated “Smart Parse” and added “Link to Survey Name” option.
- Added a tool to assist with replacing of a file that requires re-delivery (also available in the File module).

New in this version:

- Added an **Open Selected** menu option to the file grid to allow opening of selected files in production.
- Added a rule to the catalog workflow to prevent upload of items on an open data request.
- Added a tool to allow the removing of production media.
- Updated the import tool to allow the import of Parent-Child file links.
- Updated the **View Original Seismic** tool so that the **Seismic Search** grid is now auto selected.

Use the **Catalog** module to:

- Add files and media
- Add associated information
- Create bi-directional links between files, media and seismic
- Enter the metadata and potentially move the files to various media.

Note:
The Catalog module is configured to fit your company's specific cataloging workflows.

The **Catalog** module is setup to accommodate two catalog types:

- **New Item Catalog** is for new data
- **Remediation Catalog** is for data remediation

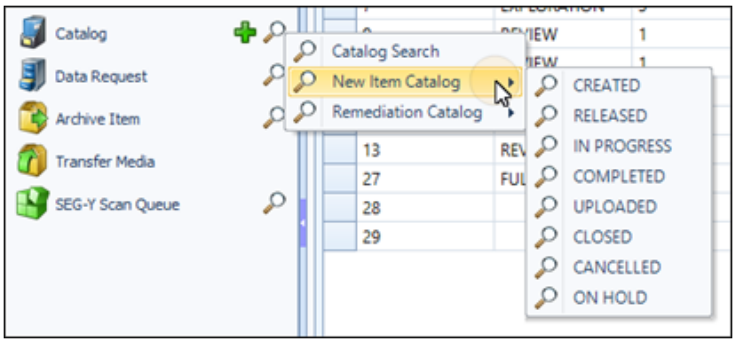
The overall features and functionality in the **Catalog** module are the same for both Catalog types. However, each type has unique statuses according to your company's workflows.

To create a new catalog session, refer to " Create a new catalog session" on page 349.

To open an existing catalog session, perform a catalog search from the **Workflows** section of the navigation panel.

To search the full repository of catalog records, click **search** and select **Catalog Search**. The **Search Catalog Records** window opens. Enter search criteria and click **Search**. The search results open in the view mode of the **Catalog** module.

Click **search** next to **Catalog** and point to either **New Item Catalog** or **Remediation Catalog**. Select the status of the catalog record and the results open in the view mode of the **Catalog** module. To learn about the view mode, see "Catalog view" on the next page.



The statuses, required fields and user roles are configured according to the different steps of each workflow. If you split your workflow into statuses, it will provide the framework for tagging required fields and setting custom user permissions.

The catalog session progresses through the statuses as defined for your company.

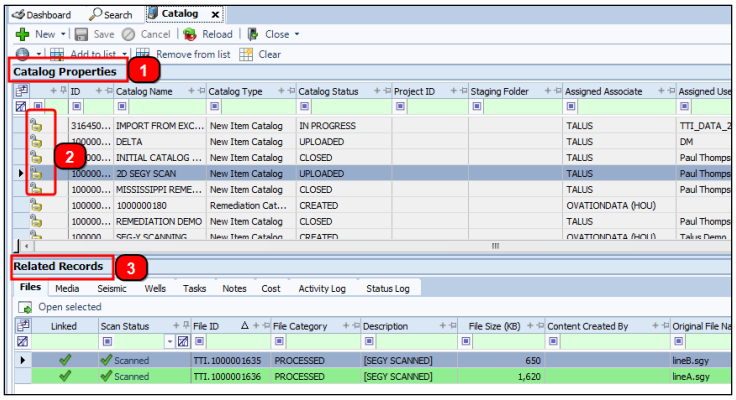
Typical statuses for a **New Item Catalog** session include:

1. **Created**: New catalog session is ready for entering information and adding files and media.
2. **Released**: Information has been added and items are ready for cataloging.
3. **In-progress**: Catalog session has been accepted and activities are in progress.
4. **Completed**: Catalog session is ready for quality control review.
5. **Uploaded**: Files are ready to be moved to media and synchronized.
6. **Closed**: Files have been synchronized and moved to production.
7. **Cancelled**: Catalog Session has been cancelled.
8. **On Hold**: Catalog Session has been placed on hold.

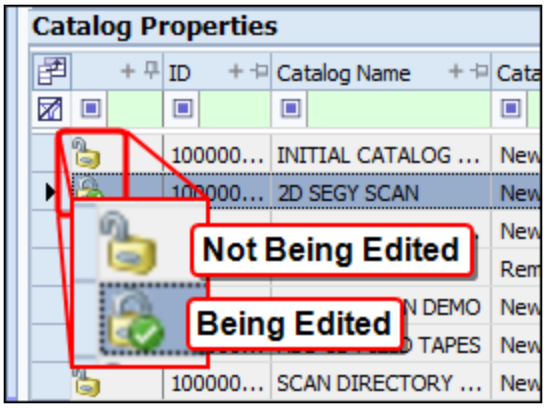
Catalog view

Performing a catalog search from the navigation panel opens a list of catalog sessions in **view mode**.

The view mode of the **Catalog** module includes the following:



1. **Catalog Properties**: This grid displays the full list of catalog sessions that match your search criteria.
2. **Lock Icon**: Indicates when someone is editing the record. The lock displays as open when a record is not being edited. A green check displays to indicate that you are editing.



> **Note:**
> Even with the lock-edit indicator, the record remains available for others to open and edit. The green lock remains for 48 hours, unless you close the record sooner or another user begins editing the record.

3. **Related Records**: This window displays information associated with the selected item in Catalog Properties. The information displays in various tabs.

Note:

In the Files tab, you'll notice that each linked file may have a highlight. A green highlight indicates that the required links have been met. A yellow highlight indicates you're missing a link to satisfy the required checks for files before you can push the items in production. A record without a highlight hasn't been linked yet.

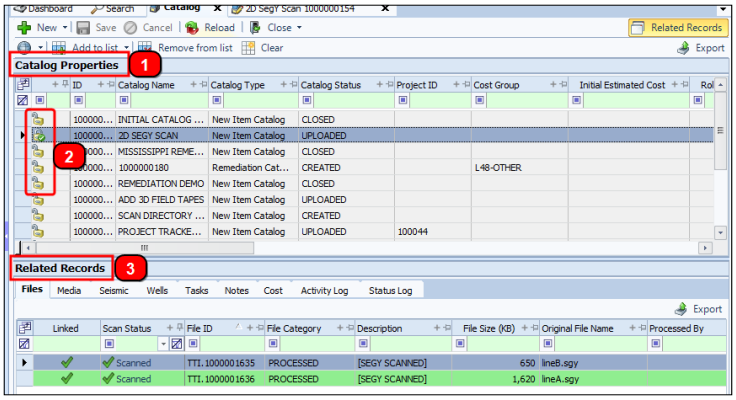
You can open a file from this tab by either:

- Double-clicking the file on the grid
- Highlighting a file on the grid then click **Open selected**.

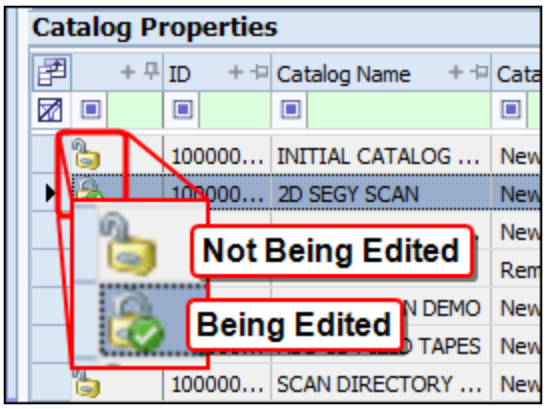
To learn about edit mode, refer to "Edit mode" on page 336.

Performing a catalog search from the navigation panel opens the list of catalog sessions in a view mode.

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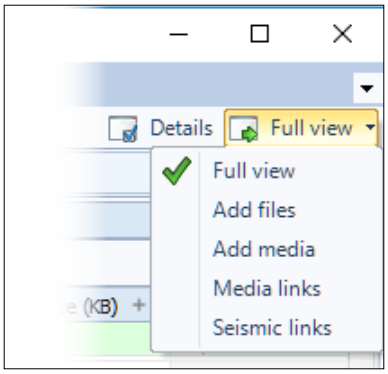
To learn about edit mode, refer to "Edit mode" on page 336.

Adjust workspace layout

The Catalog workspace in **edit mode** has functionality to edit the workspace layout.

Options include preset and custom layouts. You also have the ability to undock and float different panes.

Preset layouts



Preset layouts are available for targeted tasks in your cataloging workflow. To set the view to a preset layout, click and select an option from the upper right corner.

Preset layout options include:

- Full view
- Add files
- Add media
- Media links
- Seismic links

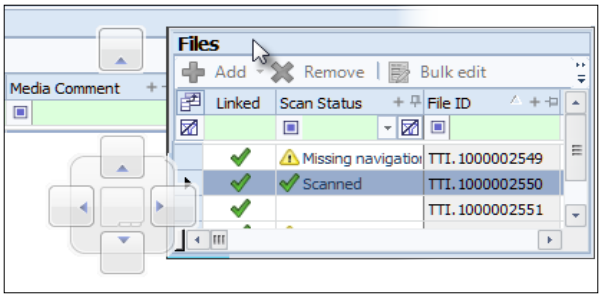
Custom layouts

The Catalog module offers flexibility to customize your workspace by undocking and repositioning panes.

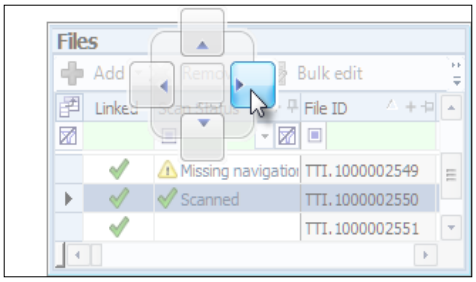
Undocking and docking to a new position

To dock a panel to a new dock position:

1. Click and hold the blue header of the panel.
2. Drag the panel out of its dock.
   Drop zone arrows display to indicate the available docking positions.



3. Move the cursor to hover over the target drop zone. When the cursor is in position, the drop arrow turns blue.



4. Release the mouse button to place the panel in the new docked position.

Undock a panel as a new window

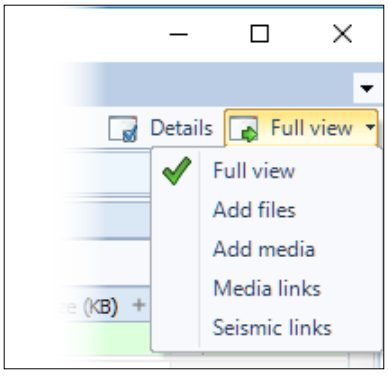
To undock a panel and use as a new window:

1. Click and hold the blue header of the panel.
2. Drag the panel out of its dock.
   Drop zone arrows display to indicate the available docking positions.
3. Release the panel anywhere *except* over a drop zone. The panel becomes a new window for you to position anywhere on your screen or even to a second monitor.

The Catalog workspace in edit mode has functionality to edit the workspace layout.

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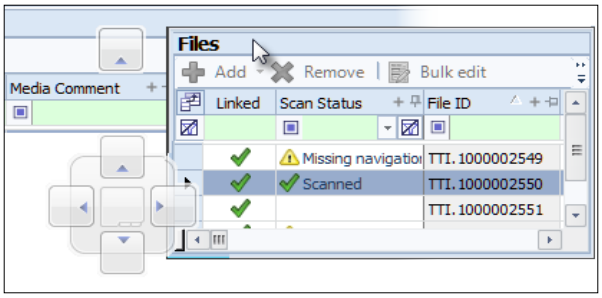
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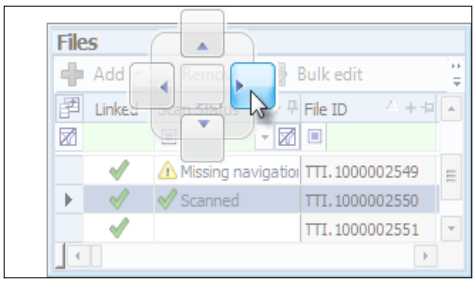
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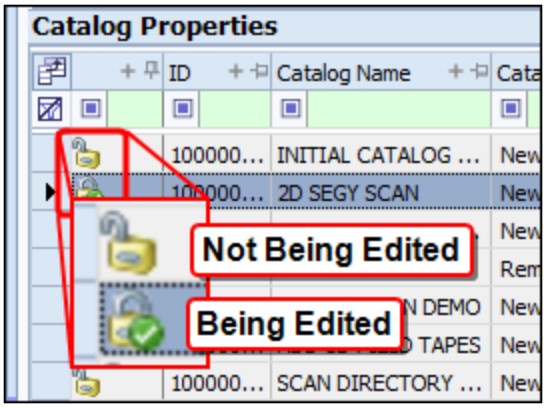
Undock a panel as a new window

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Edit mode

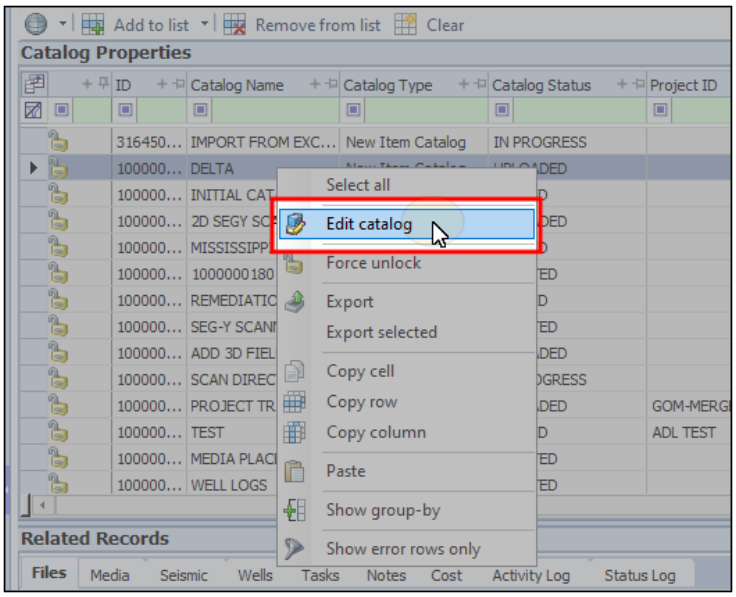
The sessions in the **Catalog Properties** grid display a soft-lock icon to indicate when a user is editing a record. If the lock displays as open, the record is not being edited by another user.



Note:
The lock icon is for indication purposes only and does not prevent others from editing.

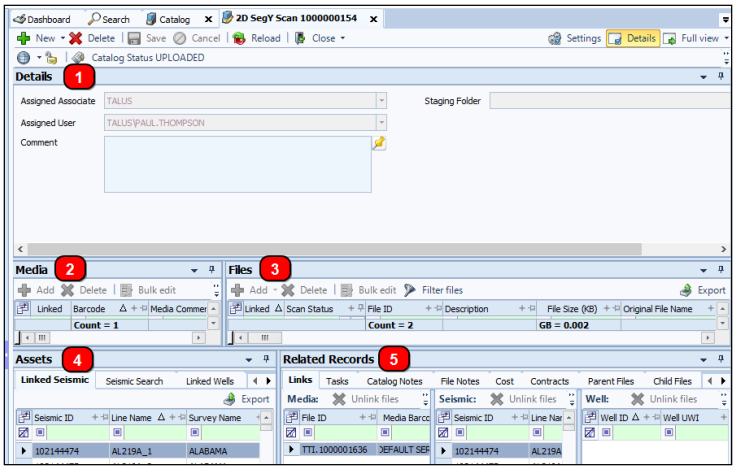
To edit a catalog record:

Double-click on the record or right-click and select **Edit catalog**.



The session opens in edit mode in the default edit view, or in the last view layout you had open. To modify the workspace layout, refer to "Preset layouts" on page 333.

The default edit layout includes five panes:



1. **Details**: general information

> **Tip:**
> Click **Details** in the upper right corner to toggle on and off.

2. **Media**: working space for adding and linking media
3. **Files**: working space for adding and linking files
4. **Assets**: includes tabs for searching Seismic and Wells, and tabs to indicate linked seismic and wells.
5. **Related Records**: includes several tabs for viewing the various categories of information associated to the catalog session.

The Catalog module has a **view mode** and an **edit mode** for catalog records.

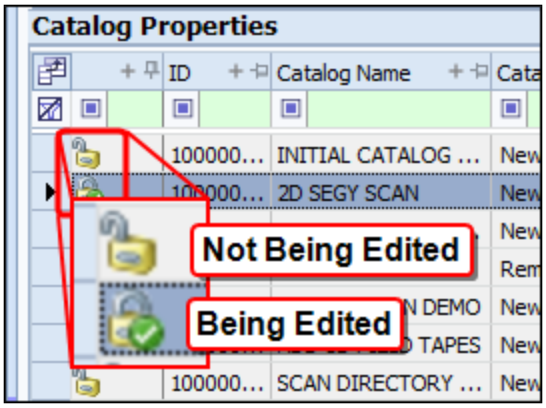
The edit mode of the Catalog module lets you add files and media, catalog detail, and link items to a seismic survey.

A catalog session progresses through various statuses specific to your company workflow.

> **Note:**
> To change the status of a session, refer to Updating the status of a catalog session.

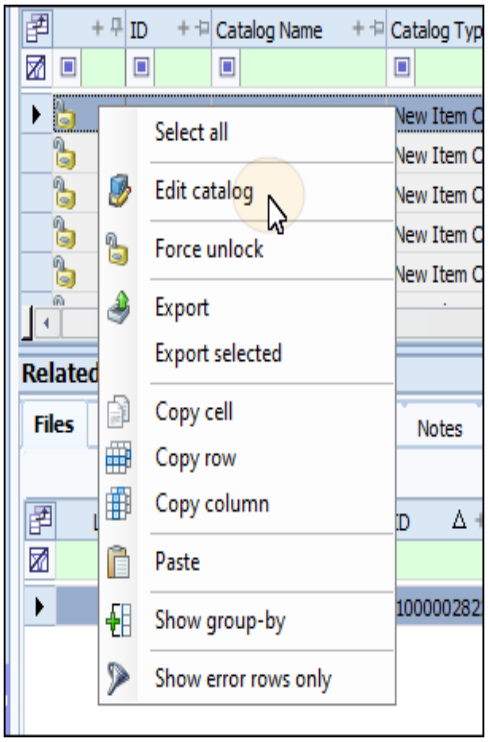
When creating a new session, the catalog window will open in edit mode.

The sessions in the **Catalog Properties** grid display a soft-lock icon to indicate when a user is editing a record. If the lock displays as open, the record is not being edited by another user. The lock icon is for indication purposes only and does not prevent others from editing.



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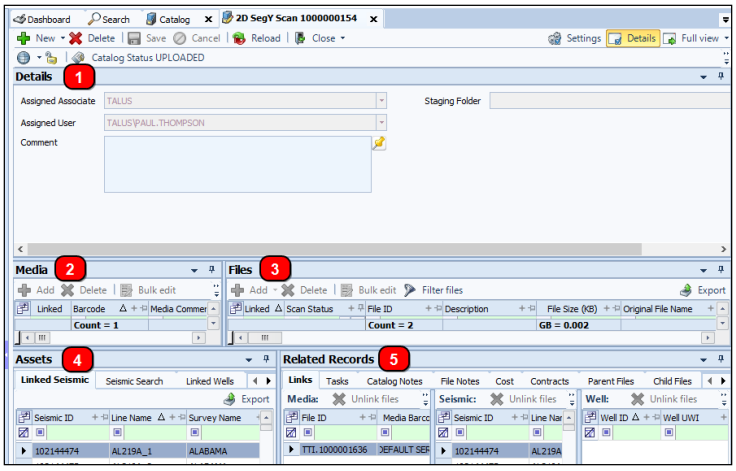
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As soon as you begin editing the record, the **Catalog Properties** grid will display a green check to indicate that you are editing. Even with the lock-edit indicator, the record remains available for others to open and edit. The green lock remains for 48 hours, unless you close the record sooner or another user begins editing the record.

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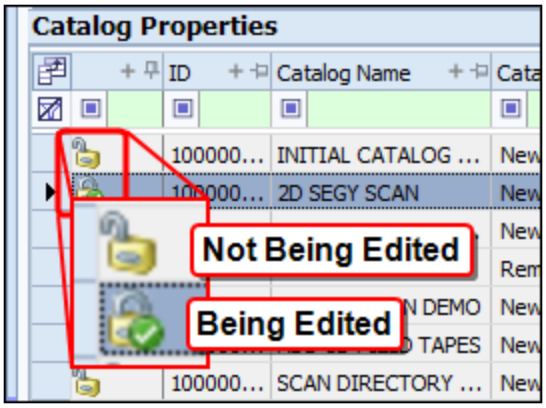
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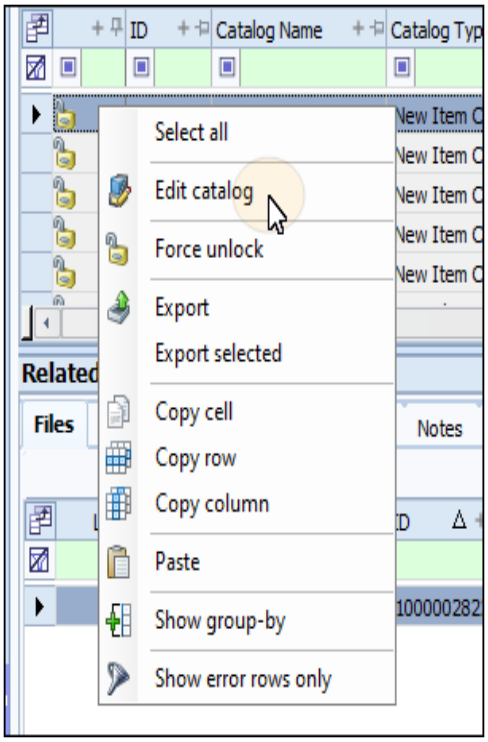
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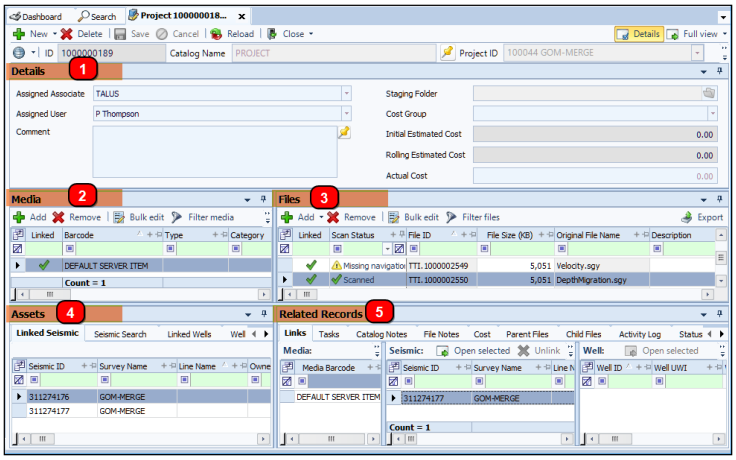
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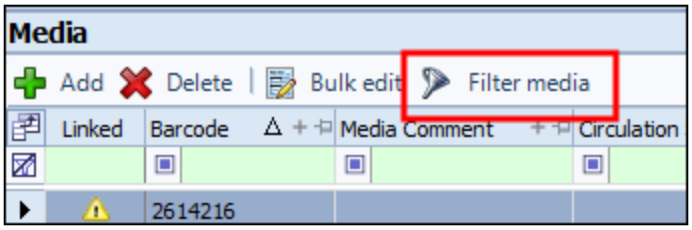
> **Tip:**
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5. **Related Records**: includes several tabs for viewing the various categories of information associated to the catalog session.

Media/File Filters

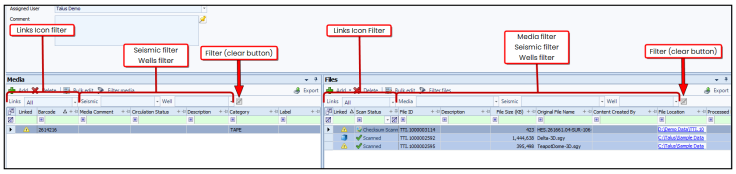
While in **edit mode**, the catalog editor has a filter toolbar on both the **catalog media** and **catalog file** views.

There is a button on each view to enable the filters on the respective toolbars.





When you select the **Filter media** button the toolbar expands to show the filters.



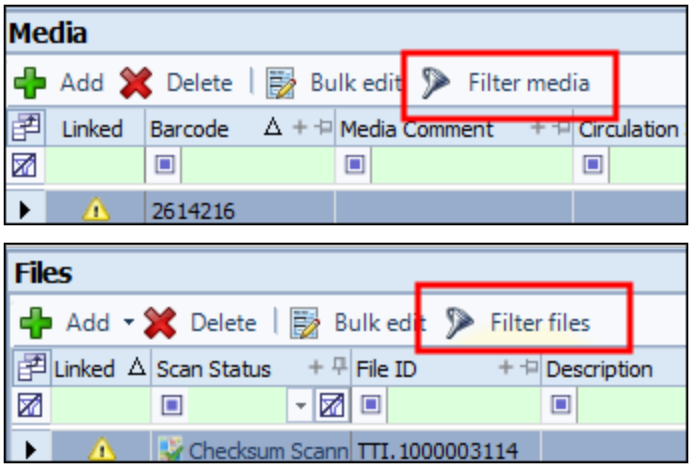
The filters have the following features:

- Multi-select has been added for each filter grid.
- Row filters are enabled allowing for custom filters to be applied to the filter grid columns. (Note, this is only available with the filter icons, not the row filter feature that is available on all grids)

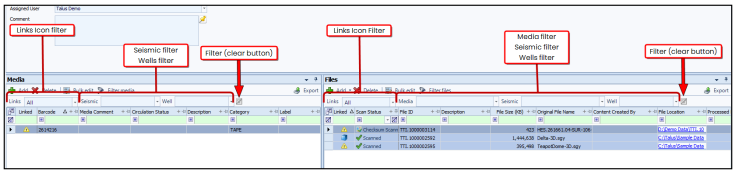
- A checkbox has been added to each filter grid.
  - The checkbox has been pinned, allowing for the ability to scroll through all the columns and still have it be visible.
- The clear button has been updated to clear all custom filters and selected checkboxes.
- Multiple filters are now applied to each (media and file) view allowing more than one filter to be active at a time.

The catalog editor has a filter toolbar on both the **catalog media** and **catalog file** views.

On each view is a button to enable the filters on the respective toolbars.



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The filters have the following features:

- Multi-select has been added for each filter grid.
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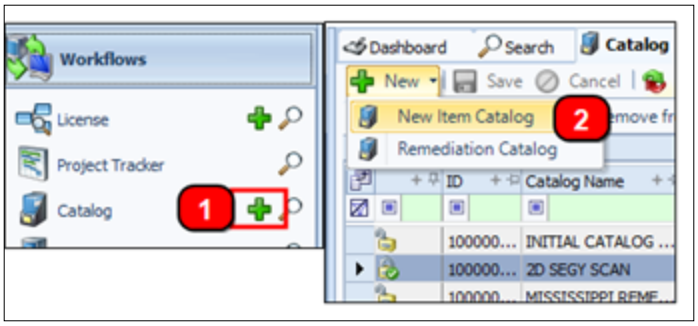


Create a new catalog session

The **Catalog** module includes a variety of features and functions for cataloging your products and linking them to the associated records in Exploration Archives. The main tasks are to add files and media, enter metadata, catalog the detail and link the items to seismic.

> **Note:**
> These instructions are relevant to the **New Item Catalog** type of catalog session. However, the **Remediation Catalog** type has the same features and layout.

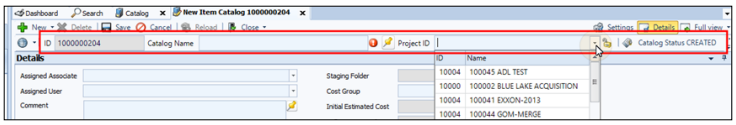
You can create a new catalog session 2 ways:



1. **On the Navigation panel:** Click **Add** beside the Catalog module
2. **From the toolbar:** Click **New**, then select **New Item Catalog** from the list.

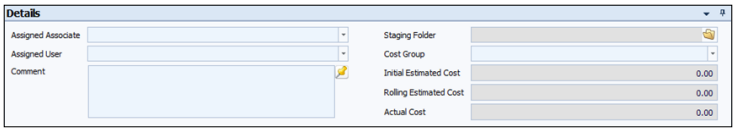
The **Catalog** module opens in the edit mode.

The **information bar** includes the following fields:



- **ID**: The ID is auto-populated.
- **Catalog Name**: This is a required field.
- **Project ID**: If needed, select the **Project ID** from the drop-down list.
- **Lock icon**: indicates if the session is locked.
- **Catalog Status**: When creating a new session, this normally displays as CREATED.

In the **Details** panel, fill out the following fields:

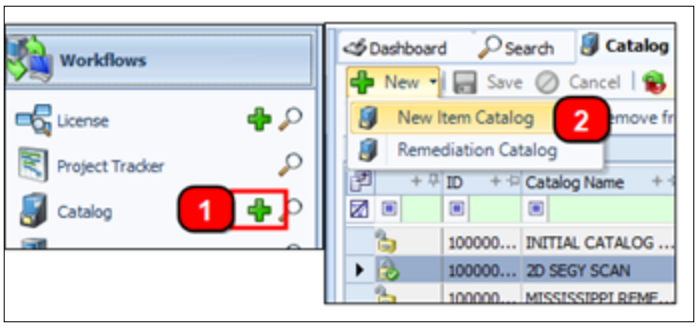


- **Assigned Associate** and **Assigned User**: Select these from their respective drop-down list.
- **Comment**: You can enter the comment directly in the field, or click the pin to open the edit window and enter a comment.
- **Staging Folder**: Click the browse icon and navigate to the location of the staging folder.
- **Cost Group**: Select the Cost Group in accordance with your company procedures.
- The last 3 fields: **Initial Estimated Cost**, **Rolling Estimated Cost**, and **Actual Cost**.

The **Catalog** module includes a variety of features and functions for cataloging your products and linking them to the associated records in Exploration Archives. The main tasks are to add files and media, enter metadata, catalog the detail and link the items to seismic.

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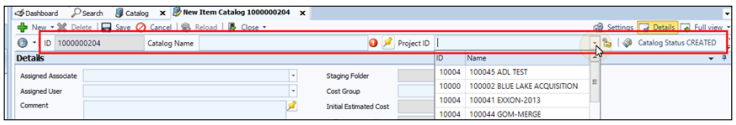
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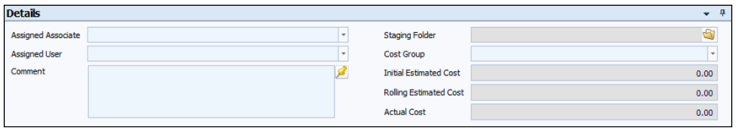
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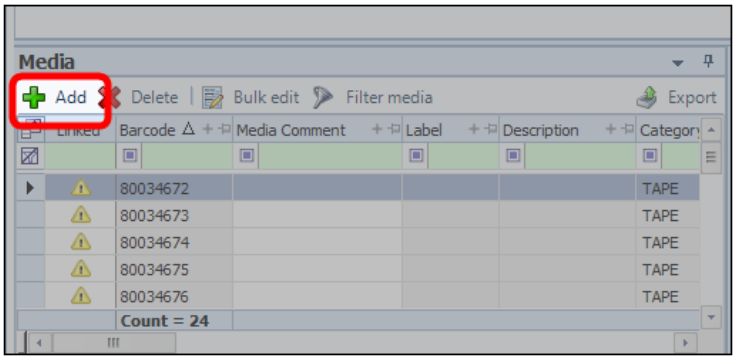


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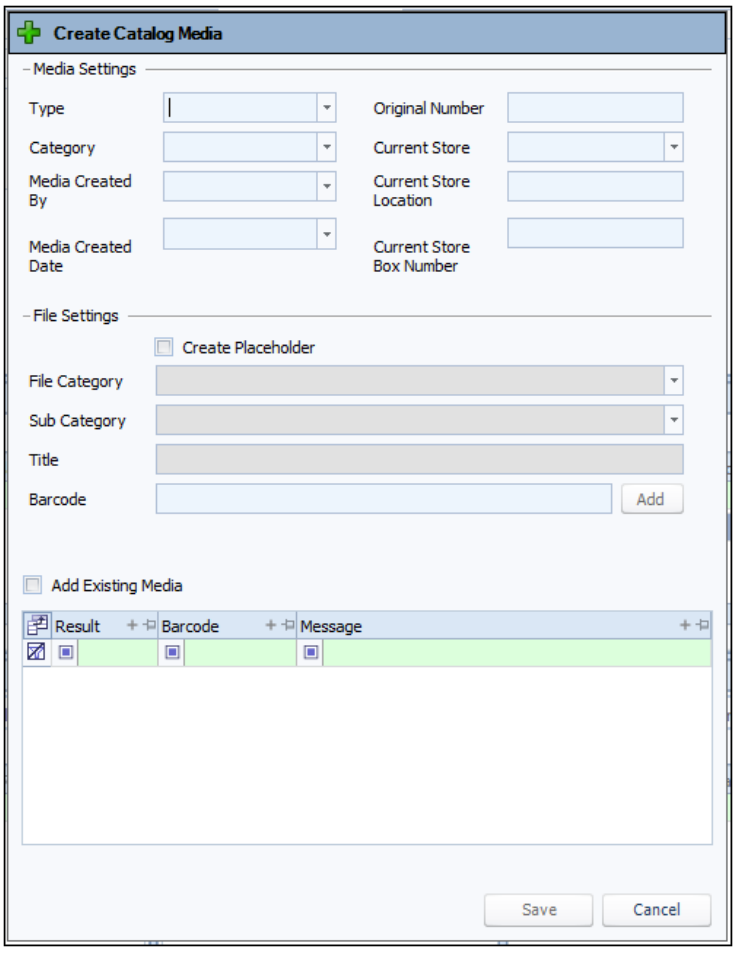
Add media

To add media to a catalog session, open the session in edit mode. The default layout for the edit mode includes all five workspace panes. To modify the workspace layout, refer to "Preset layouts" on page 333.

To add media, click **Add** from the **Media** panel.



The **Create Catalog Media** window opens.

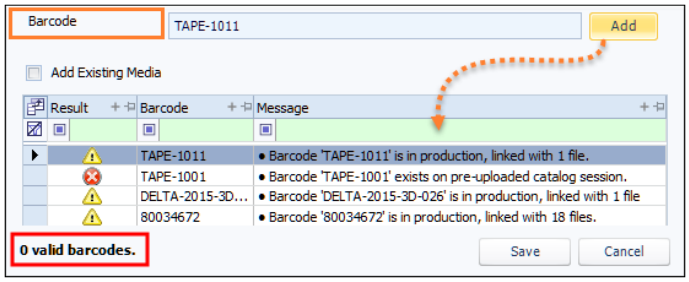


The **Create Catalog Media** Window lets you add many media sources creating a **batch**. The information you enter in the 2 sections of the window attach to the media.

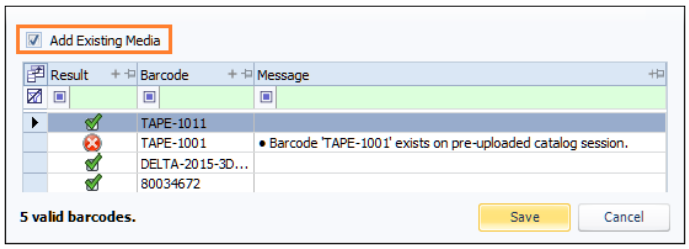
Add media to the batch:

» Using a barcode reader, scan the barcode to auto-populate the **Barcode** field.

Tip:
Alternatively, type in the field to enter the barcode.



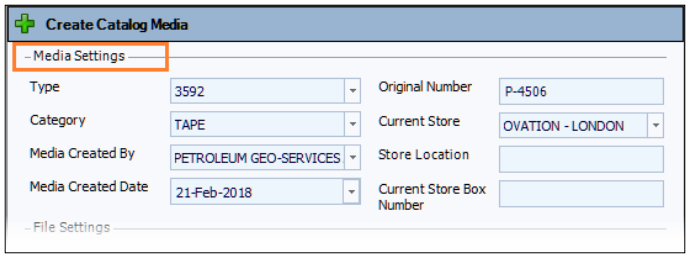
- If the message column indicates that the media is in production, you can override the validation restriction by selecting **Add Existing Media**. For existing media, the media will add to the catalog session without updating the **Media Settings**.



Adding Media Details:

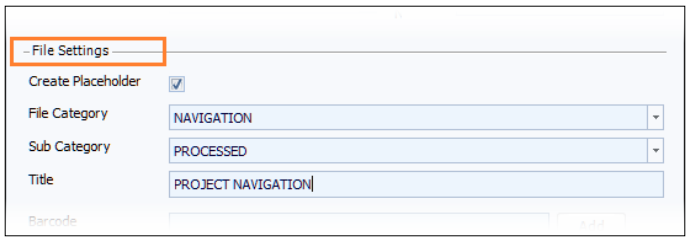
Metadata that could be common to the media included in the batch is split into two sections:

- **Media Settings**: Use the fields in this section to enter information such as the Type, Category, and who the media was created by.



- **File Settings**: Used for creating a placeholder for a file which is useful for a large dataset such as field data or gathers.

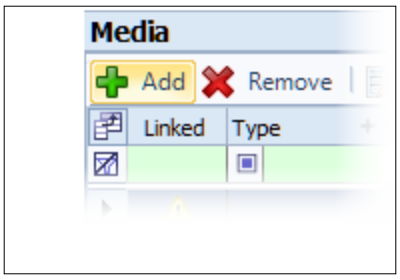
  Select **Create Placeholder** to open the file metadata fields and enter the associated detail.



» Click **Save** to add the valid barcodes, and the window closes.

To add media to a catalog session, open the session in edit mode. The default layout for the edit mode includes all five workspace panes. To modify the workspace layout, refer to "Preset layouts" on page 333.

To add media, click **Add** from the **Media** panel.



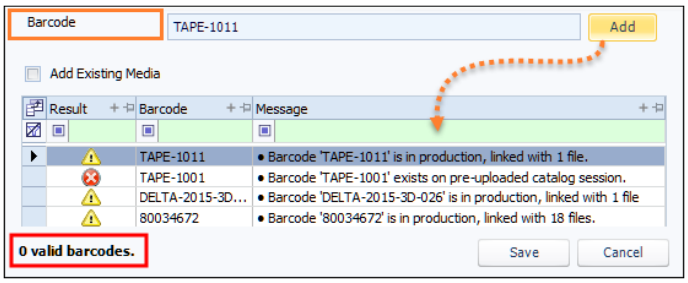
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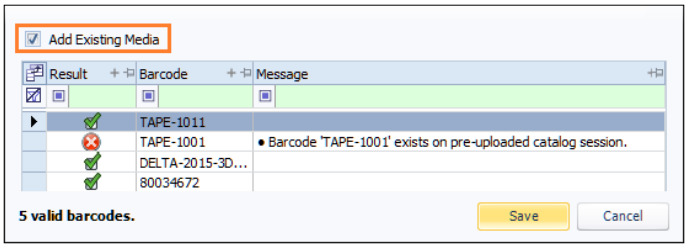
Add media to the batch:

» Using a barcode reader, scan the barcode to auto-populate the **Barcode** field.

> **Tip:**
> Alternatively, type in the field to enter the barcode.



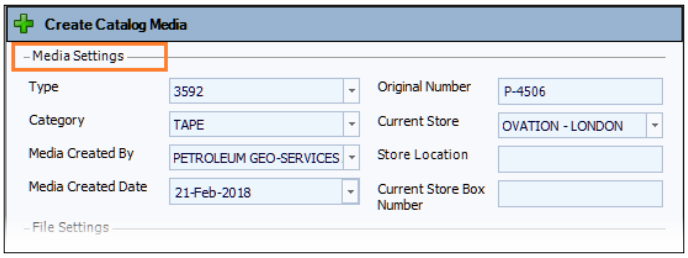
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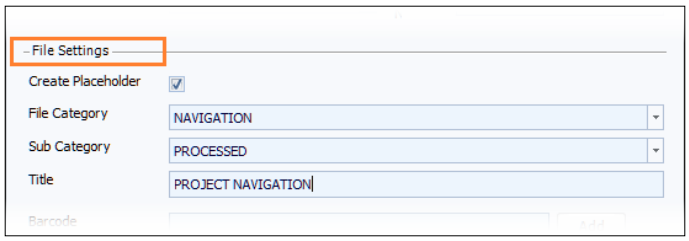
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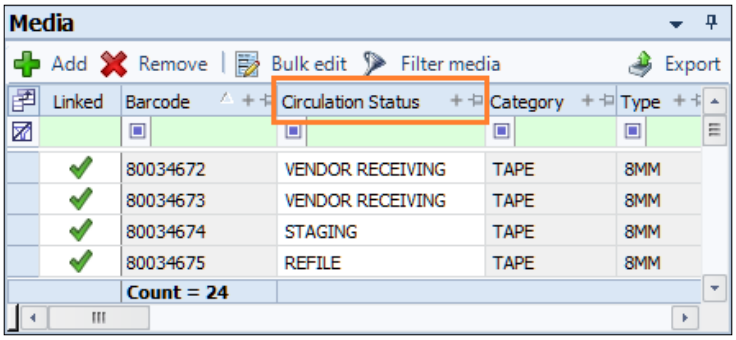
  Select **Create Placeholder** to open the file metadata fields and enter the associated detail.



» Click **Save** to add the valid barcodes, and the window closes.

View circulation status

To view the circulation status of a media item, locate the **Circulation Status** column in the main grid of the Media panel.

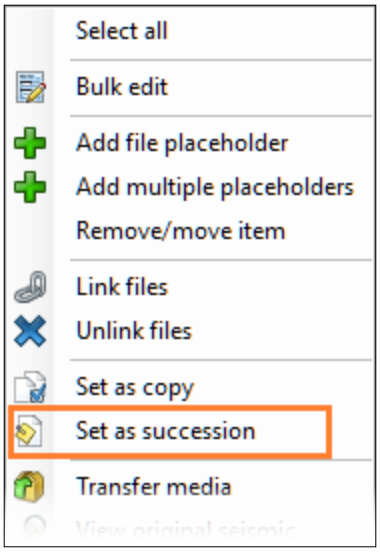


Set media as a succession

If a media item in your catalog session is the successor of another media, set the media as the succession by specifying the original media.

To set a media as a succession of another media item:

1. In the **Media** grid, select the item to be set as a succession.
2. Right-click on the item to open the context menu and select **Set as succession**.



The **Set as succession** window opens.



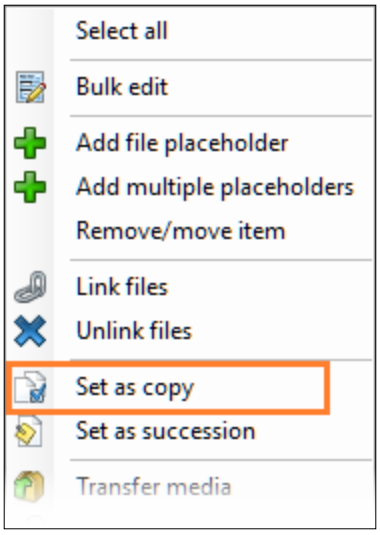
3. Search for the original media to assign and select. Click **Save**.

Set as a copy

If a media item in your catalog session is a copy of another media, set the media as a copy by specifying the original media.

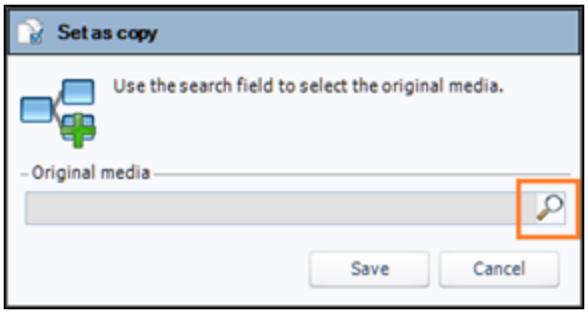
To set a media as a copy of another media item:

1. In the **Media** grid, select the item to be set as a copy.
2. Right-click on the item to open the context menu and select **Set as copy**.



The **Set as copy** window opens.

3. Search for the original media to assign and select. Click **Save**.

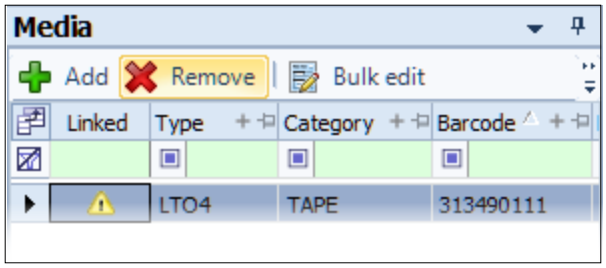


Move or remove media

Media that has been added to a session can be removed from the session or moved to another session.

To remove media:

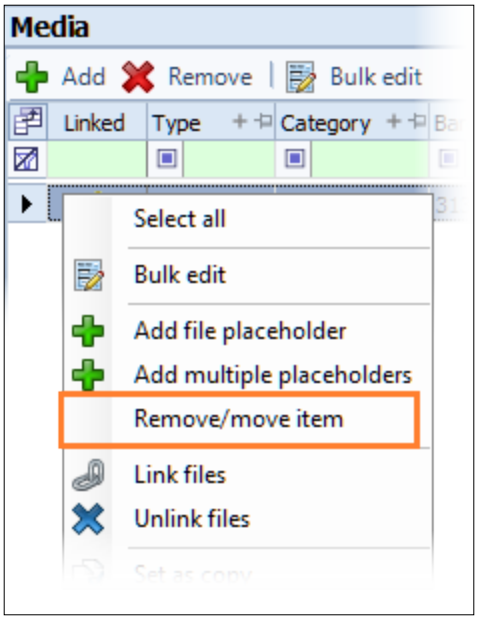
1. Select the media in the **Media** grid and click **Remove** from the toolbar.



2. A confirmation message opens. Click **Yes** to confirm.
3. The media record removes from the grid.

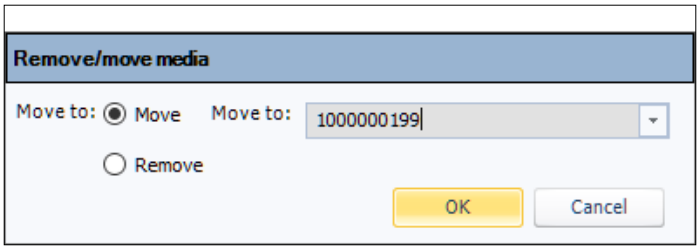
To move media to another session:

1. In the **Media** grid, select the item to move.
2. Right-click on the item to open the context menu and select **Remove/move item**.



   The **Remove/move media** window opens.
3. In the **Move to** field, select the session to move the media to. Click **OK**.

The media removes from the current session and adds to the specified session.



Add files

The **New Item Catalog** module has a couple of options for adding a file to Exploration Archives during the cataloging process:

- Drag and drop
- Add files or directory options from the grid menu

Files are any form of consumable seismic product and are available online, offline or nearline.

Depending on your company workflow, the files could originate in a staging directory on your desktop computer, or in another designated location.

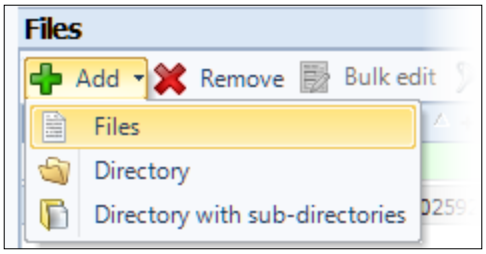
Note:
Adding a file to Exploration Archives auto-generates a **File ID** in the **Files** grid. At the same time, the original file in the originating directory will be renamed with the **File ID** appended as a prefix to the name.

Adding files with drag and drop

1. Navigate to the location of your file.
2. Click then drag and drop the file to the **Files** grid.
   The file automatically loads to the grid with an auto-generated **File ID**
3. Select, or enter, the details for the relevant columns.
4. Click **Save**.

Adding files using the Add button

1. In the **Files** panel, click **Add** and select the item type to add:



   - Files
   - Directory
   - Directory with sub-directories

2. Navigate to the item you are adding. Select and click **Open** or **Select Folder**. The item adds to the grid and auto-populates the **File ID**, **File Size** and **Original File Name** and **Trimmed Location**.
3. Select, or enter, the details for the relevant columns.
4. Click **Save**.

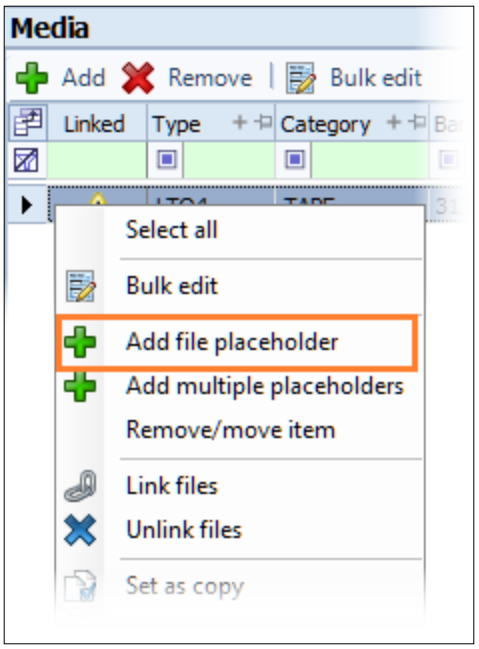
Add file placeholders

A **placeholder** is used to point to media that hasn't been remediated.

Creating a placeholder adds a new file record in the **Files** grid and automatically links to the file to the selected media. The placeholder becomes available for editing as needed. Exploration Archives generates a file ID for each new file placeholder.

To add a file placeholder for an individual media:

1. Select a media item from the **Media** grid that your file placeholder will link to.
2. Right-click on the media and select **Add file placeholder**.

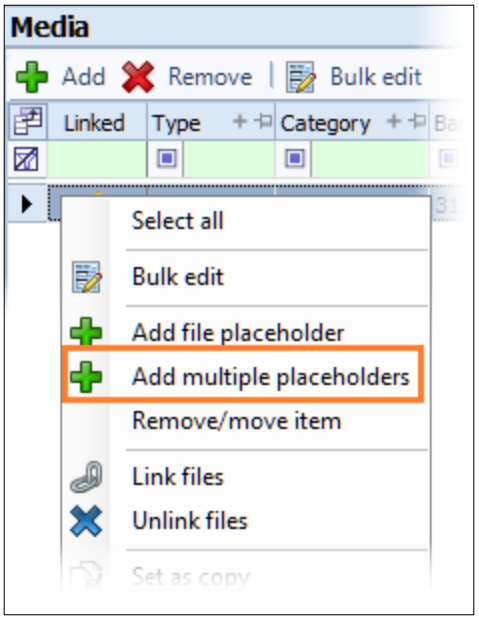


A new row is instantly added to the **Files** grid with an auto-generated **File ID**. The media automatically links to the file placeholder.

3. Enter the associated information for the file placeholder, as applicable.
4. Click **Save**.

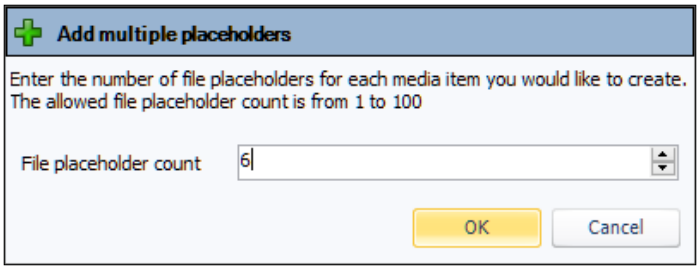
To add more than one placeholder for one or more media...

1. Select the media row(s) in the **Media** grid that require more than one file placeholder each.
2. Right-click on the media and select **Add multiple placeholders**.



A pop-up opens for you to specify the number of placeholders per media you want to create.

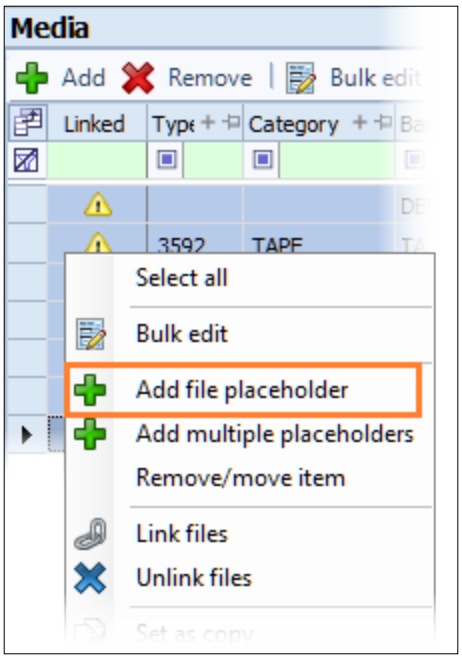
3. Select a number and click **OK**.
   New rows add to the **Files** grid with auto-generated **File ID**s. Each media automatically links to specified number of file placeholders.



4. Enter the associated information for each placeholder, as applicable.
5. Click **Save**.

To simultaneously add a placeholder to multiple media:

1. Select multiple media items in the **Media** grid.
2. Right-click on the media and select **Add file placeholder**.



   A file placeholder is automatically created in the **Files** grid for each selected media, using a one-to-one linking.

3. Enter the associated information for each placeholder, as applicable.
4. Click **Save**.

Link files to media

> **Note:**
> Media is anything that is a storage device including a server, tape, map, optical, section or support media. Digital files must be linked to the host server.

The **Media** grid of the **Catalog** module is a working space for media items.

Linking files to a media will associate the files to the media in your data repository.

Exploration Archives supports many-to-many linking with the following scenarios:

- Multiple media to multiple files
- Multiple media to one file
- One media to multiple files

The Catalog module offers two methods for linking files and media; a drag and drop action and a context menu command.

Option 1: Use drag and drop to link files to media

The drag and drop method is reciprocal. Dragging from the media to the file grid produces the same results as dragging from the file grid to the media grid.

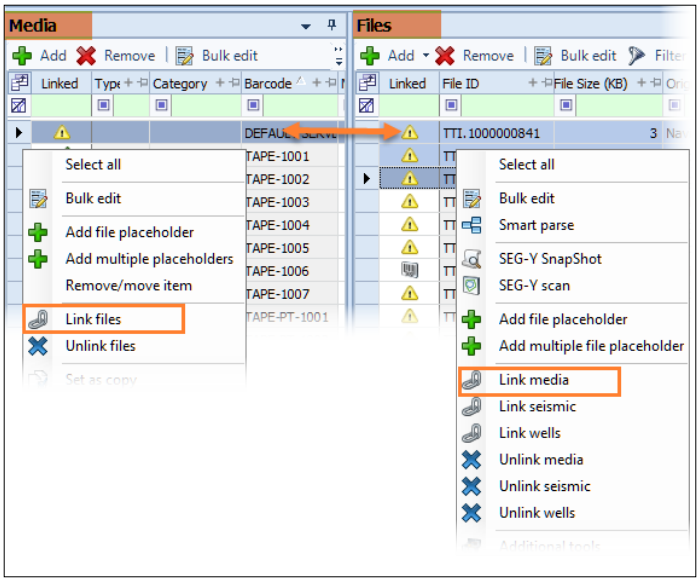
1. Click to select a file in **Files** grid.
2. Click and hold the file. Drag and drop the file to the media item in the **Media** grid.
   The **Linked** columns update in each grid to show the linked icon.

Option 2: Use the context menu to link files to media

The linking action is reciprocal. The **Link files** action from the **Media** grid and the **Link media** action from the **Files** grid produce the same results.

1. Click to select the media item(s) in the **Media** grid.
2. In the **Files** grid, select the item(s) associated to the media.
3. Right-click in the **Files** grid to open the context menu. Select **Link files**.
   The **Linked** columns update in each grid to show the linked icon.
   The **Links** tab in the **Related Records** panel displays the media linked to a file selected in the **Files**

grid.



Verify file links

Particular linking must be established to complete a catalog session.

The required linking includes:

- Each file must link to at lease one seismic.
- Each media must link to at least one file.

The **Catalog** module provides several features for verifying the links.

Link icons

The **Linked** column in the **Media** and **Files** grids indicates the linking relationships. Hover over the icons in the column to display the link definition.

For items in the **Media** grid, the linked icon indicates either linked to file or no links.

Files accommodate more versatile linking and the **Linked** column displays various linking icons.

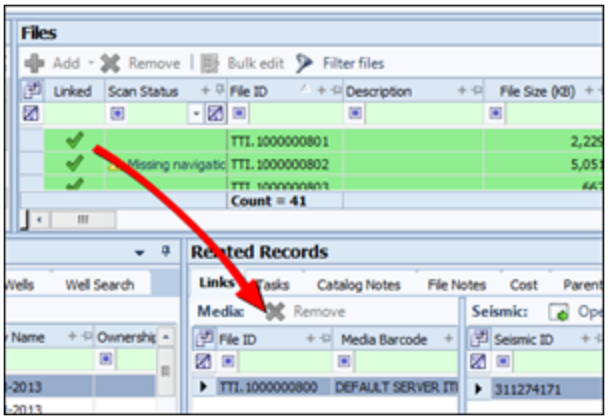
Files grid Linked definitions:

- No links
- Linked to media only
- Linked to seismic or well only
- Linked to both media and seismic or well

Note:
Items in the Files grid have a shaded background. A green background means the file is linked. A yellow background means you're missing a link to satisfy the required checks for files before you can push the items in production. Files that don't have a colored background haven't been linked yet.

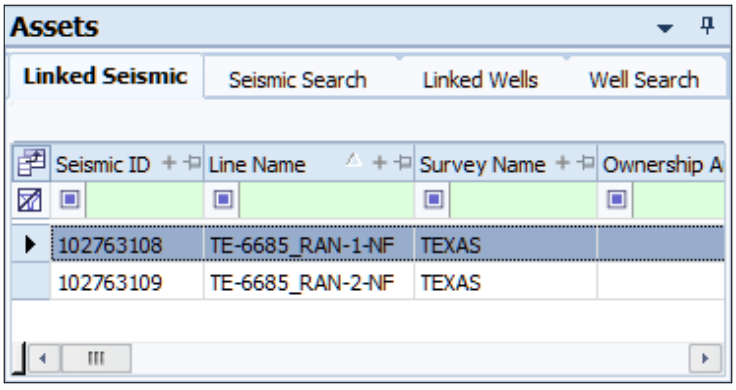
Related Records Links tab

The **Related Records** panel includes a **Links** tab that displays the links of a selected file. Click on a file in the **Files** grid. Open the **Links** tab in **Related Records**. The links for the particular file display in separate panes for **Media**, **Seismic** and **Wells**.



Assets panel

The **Assets** panel includes a **Linked Seismic** and **Linked Wells** tab. Click on these tabs to view the associated list of linked assets.



The **Seismic Search** and **Well Search** tabs include a linked icon in the leader column for any linked assets that display in the list of search results.

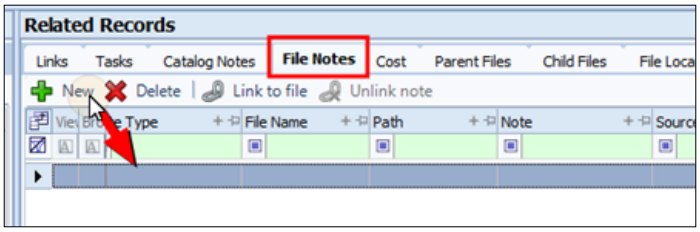
Add file notes and attachments

The **Related Records** panel of the **Catalog** module includes a **File Notes** tab for adding notes or attaching a document for supplementary information. This is useful for attaching transmittals, SEG-Y headers or any other file-related document.

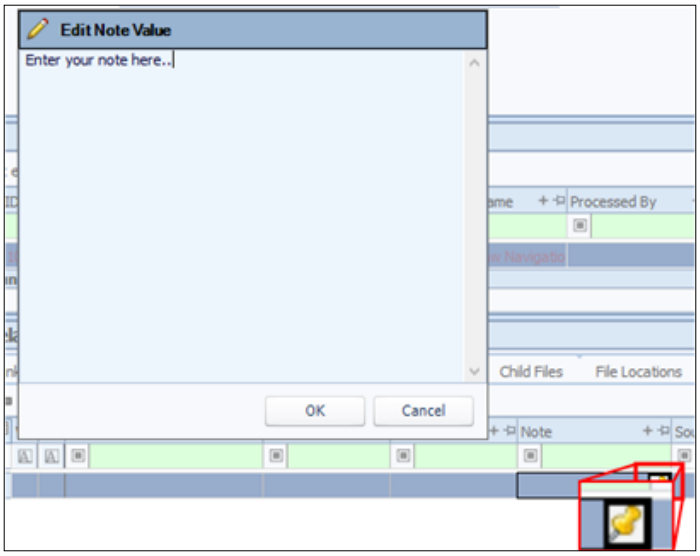
You can link file notes to a single file or to multiple files. When you initially create a note, it links to the file that you have selected in the **Files** grid. To link to multiple files, use the **Link to file** button in the **File Notes** tab. Refer to "Link notes to multiple files" on page 374 for details.

To create a file note:

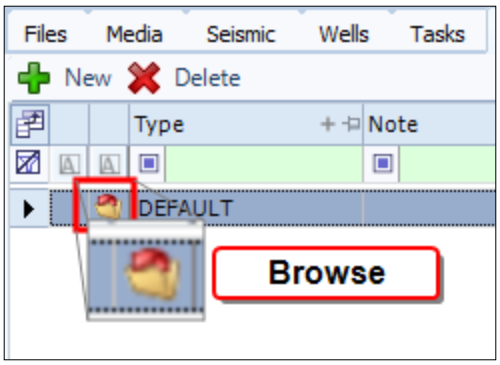
1. Select the target file in the **Files** grid.
2. Click the **File Notes** tab in the lower panel.
3. Click **New** to create a new note. A row populates in the grid for you to edit.



4. Select the entry type in the **Note Type** column.

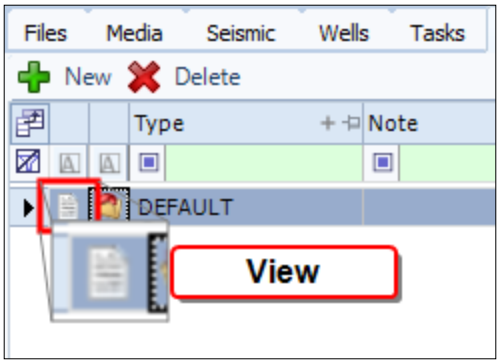


5. To add text in the **Note** column, hover over the cell to activate the enter icon . Click the icon to open the entry window.
6. Type the note details and click **OK**.
7. To add an attachment, click browse in the row to open the browser window.



8. Navigate to the file location, select the file and click **Open**. The file details populate in the **File Name** and **Path** columns.
9. Click **Save**.

To view a file, click **view** in the leader column.

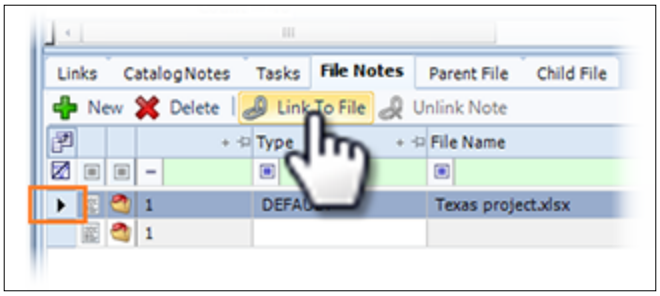


Link notes to multiple files

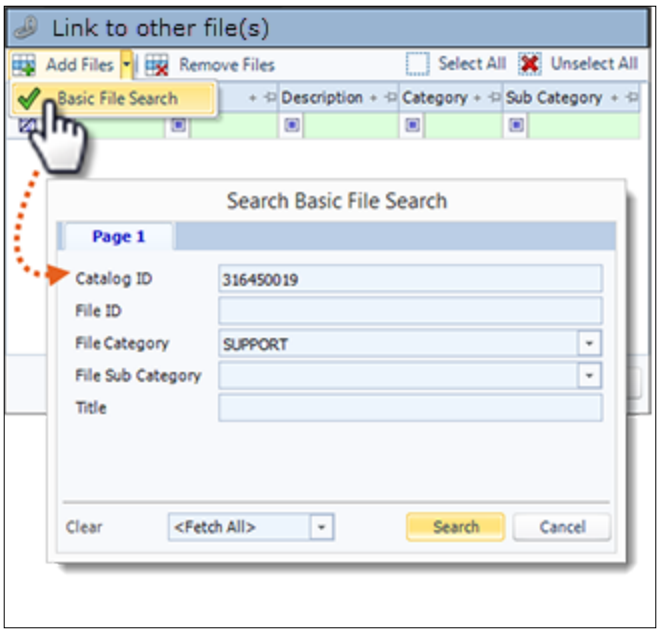
When you initially create a note, it links to the selected file in the **Files** grid. To link to multiple files, use the **Link to file** button in the **File Notes** tab.

To link a note to multiple files:

1. Select the target note in the **File Notes** tab and click **Link to file**. The **Link to other file(s)** window opens.

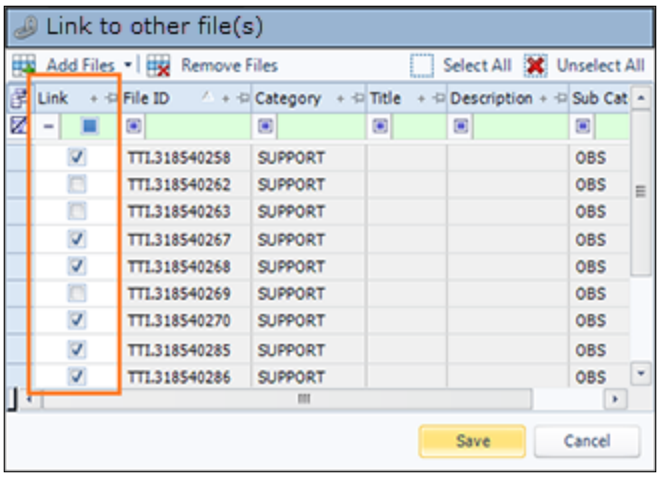


2. Click **Add Files** and select a search option to search the files.

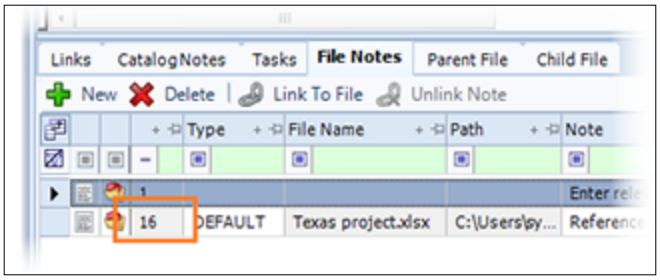


   A search window opens. The scope of the search only includes the files that are in the current catalog session, as indicated in the image by the **Catalog ID**.

3. In the new window, select your search criteria and click **Search**. The results populate in the **Link to other file(s)** window.
4. In the **Link** column, select the files to link the note to.



5. Click **Save**.
   The window closes and the **File Notes** tab displays the number of files the note is linked to.



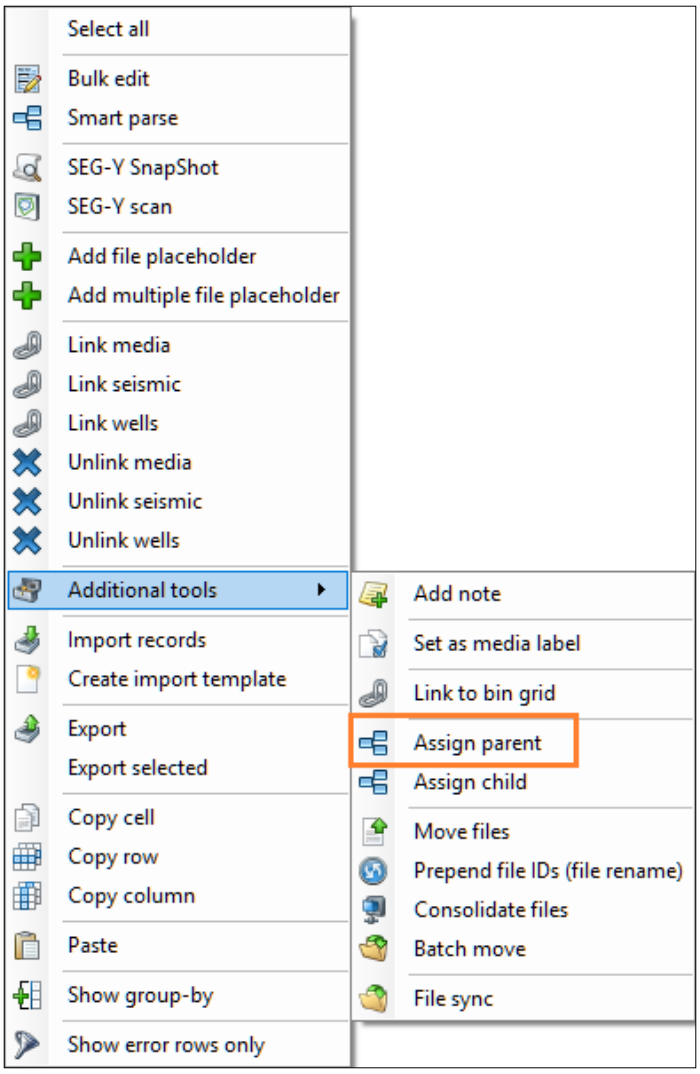
Assign a parent file

In the **Catalog** module, use the **Files** grid to assign a parent file. When complete, the assigned parent files display in the **Parent Files** tab of the **Related Records** panel.

Exploration Archives accommodates a many-to-many relationship for parent and Related Records. A parent record can have multiple children and a child record can have multiple parents.

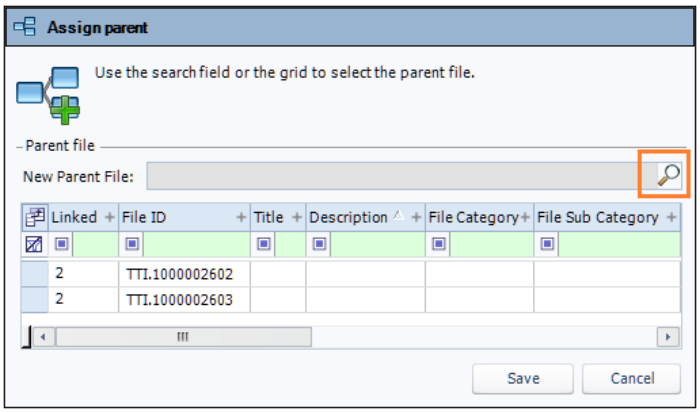
To assign a parent to one or more items:

1. Use one of the following methods to select the item(s) in the **Files** to create a parent relationship:
   - Click to select a single row.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
   - To select multiple individual rows, press Ctrl while clicking to select.
2. Right-click on a selected row to open the context menu.
3. Point to **Additional tools>Assign parent** .



The **Assign parent** window opens.

4. Either select an item in the grid or search for the parent item(s) to assign and select.



If you select an item in the grid, that item will become the parent of the others in the **Files**.

If you search and select an item, the new item will become the parent of the others in the **Files**.

5. Click **Save**.
   The assigned parent record displays in the associated tab in the **Related Records** panel.

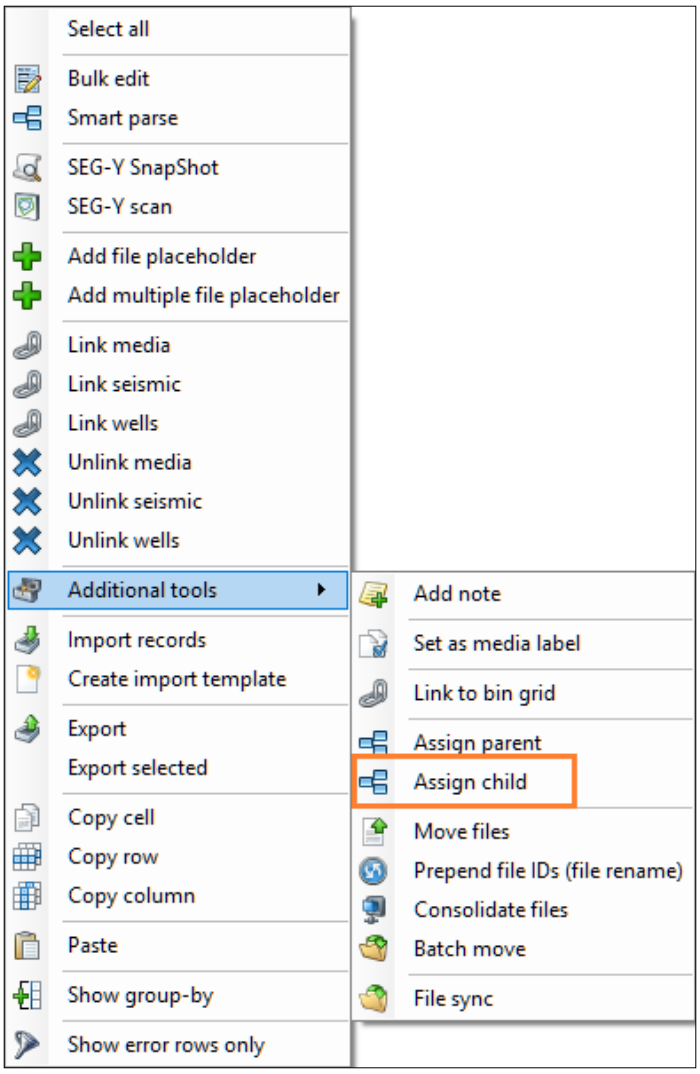
Assign a child file

In the **New Item Catalog** module, use the main **Files** grid to assign a child file and use the **Child File** tab in the associated records area to view the results.

Exploration Archives accommodates a many-to-many relationship for parent and Related Records. A parent record can have multiple children and a child record can have multiple parents.

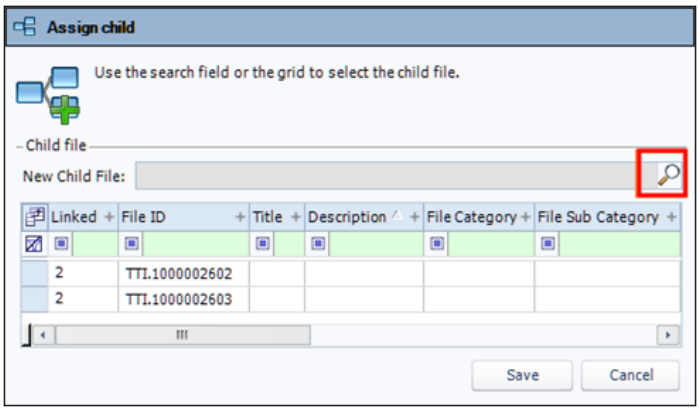
To assign a child to one or more items:

1. Use one of the following methods to select the item(s) in the **Files** to create a child relationship:
   - Click to select a single row.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
   - To select multiple individual rows, press Ctrl while clicking to select.
2. Right-click on a selected row to open the context menu.
3. Point to **Additional tools>Assign child**.



The **Assign child** window opens.

4. Either select an item in the grid or search for the child item(s) to assign and select.



If you select an item in the grid, that item will become the child of the others in the **Files**.

If you search and select an item, the new item will become the child of the others in the **Files**.

5. Click **Save**.
   The assigned child record displays in the associated tab in the **Related Records** panel.

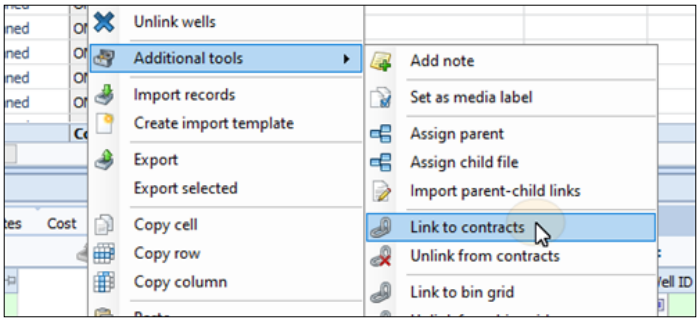
Link File to Contract

The **Files** panel of a **Catalog** lists all the files attached to it.

Files can also be attached to existing contracts.

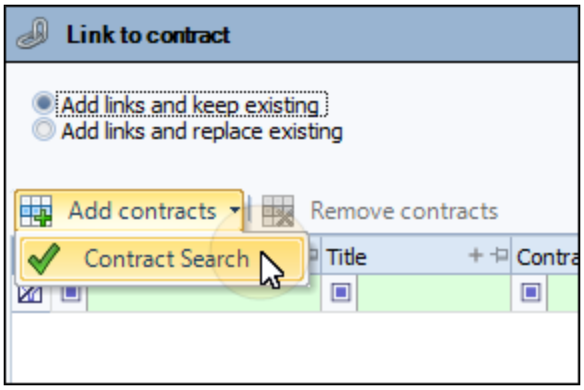
To link a file to a Contract in the Catalog Module:

1. In the Catalog Properties panel, double-click on a catalog to open it in a new tab.
2. Once the catalog is open, select a file or multiple files in the Files panel.
3. Right-click the selected files to open the context menu. Select **Additional Tools>Link to contracts**.

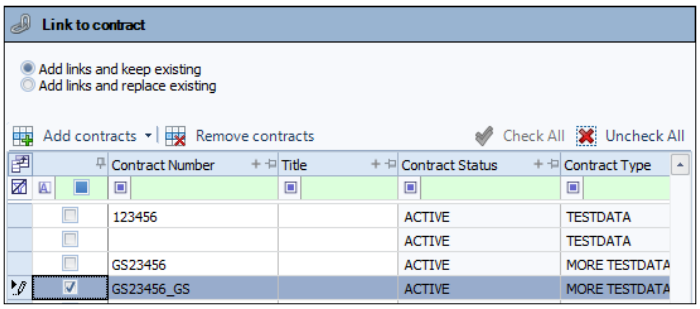


   The Link to Contracts window opens.

4. In the Link to contract window select **Contract Search** from the Add Contracts drop-down.



5. Enter your search criteria, then click **Search**. The results will populate the grid in the Link to contracts window.
6. From the results, select the check box next to the contracts to be linked.


Link to contract
Add links and keep existing
Add links and replace existing
Add contracts
Remove contracts
Check All
Uncheck All
Contract Number
Title
Contract Status
Contract Type
123456
ACTIVE
TESTDATA
ACTIVE
TESTDATA
GS23456
ACTIVE
MORE TESTDATA
GS23456_GS
ACTIVE
MORE TESTDATA

> **Tip:**
> You can also click **Check All** to select all the contracts in the list.

7. Select the option to either add links and keep existing or to add links and replace existing for the selected files.
8. Click **Save**.
9. The contracts will appear under the Contracts tab in the Related Records panel for each file that was selected.

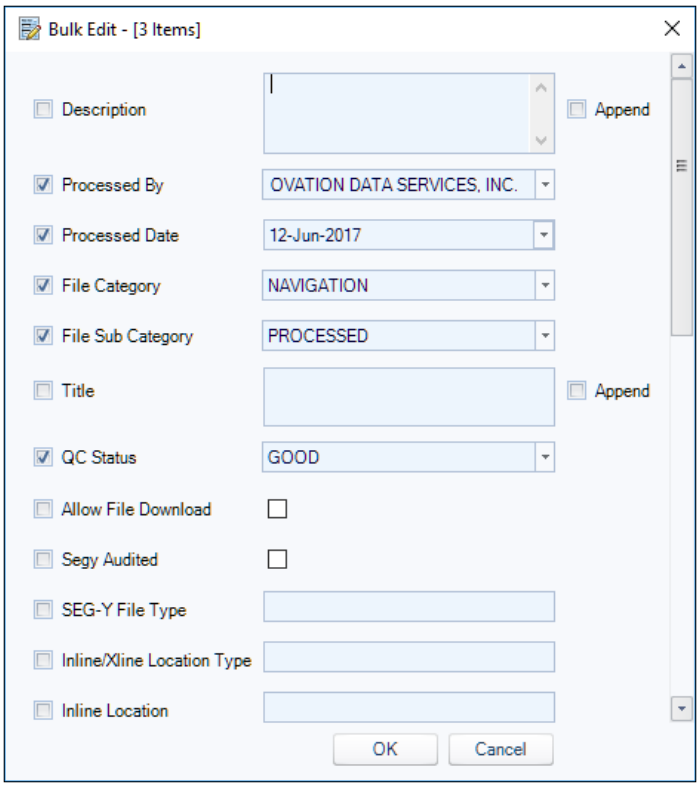


Update metadata

The metadata for a file describes the data details of an item. Exploration Archives uses metadata for cataloging and locating resources.

To update shared metadata across for file items or media, use the **Bulk Edit** tool.

1. In the leader column of the **Files** or **Media** grid, click and drag to select multiple rows.
2. In the toolbar click **Bulk edit**.



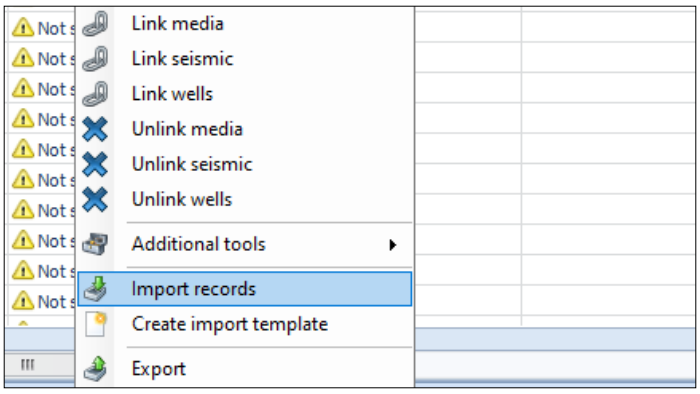
3. Enter details to edit. Scroll to view all field options.
4. Click **OK**. The new information displays in the **Files** or **Media** grid.
5. Click **Save**.

Import Records

Besides having the ability to add files to a catalog, you can also import records using a Microsoft Excel file.

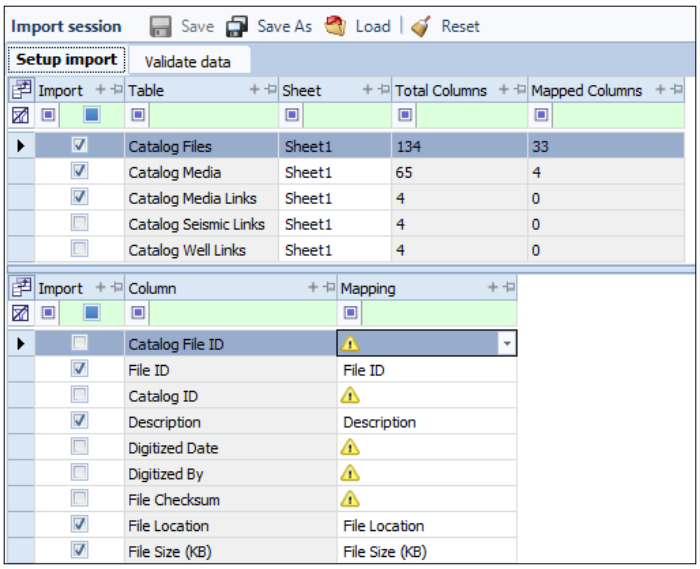
To import records:

1. In the Catalog Properties panel, double-click on a catalog to open it in a new tab.
2. Once the catalog is open, select a file or multiple files in the Files panel.
3. Right-click the selected files to open the context menu. Select **Import records**.



4. When the file explorer opens, navigate to the location of the file and select it.
5. Click **Open**. The import records window opens. The window is split into 2 tabs:

   Setup Import: This tab is used to Map the columns of the Excel file to the columns in the files grid.



   On the top half of the window select the sheet in the excel file you want to use for the field. You can use more than one sheet, just select it from the drop-down in the sheet column.

> **Note:**
> You can also restrict which sheet the data is imported from by selecting the Single Sheet checkbox, located in the right corner.

   The column headings will map to the appropriate column on the grid in the bottom half.

> **Note:**
> If you want to save your setup and import the data later, click **Save**. Click **Load** to recall the settings and continue the import.

   You can confirm the data by going to the **Validate data** tab.

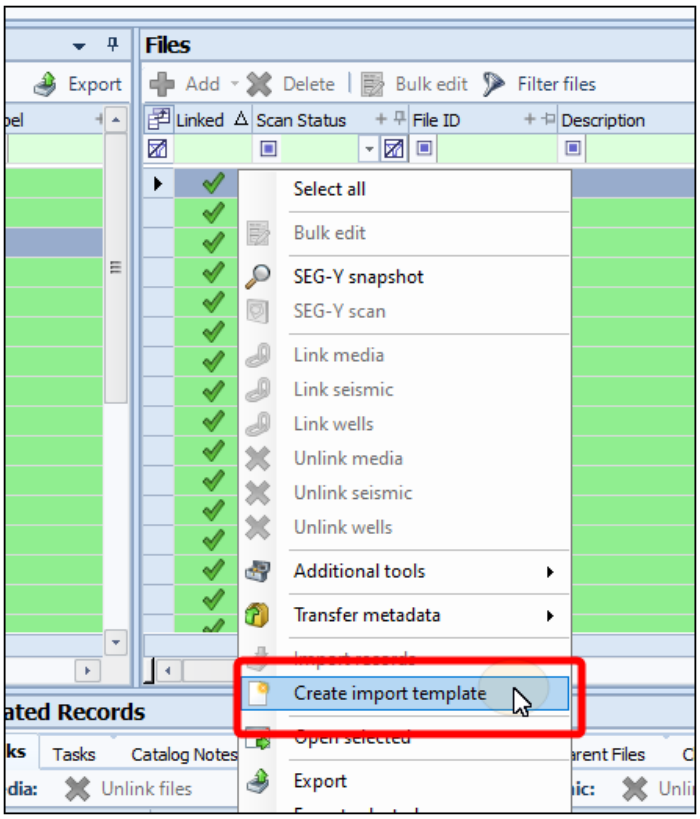
6. Once you have imported and validated the data, click **Import**. The window will close and the records will be added to the files panel.

Create an Import template

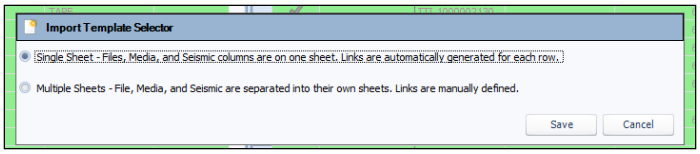
When importing records from an Excel file it's beneficial to be able to create an import template. This tool will create a blank file that you can fill in and then use to import the records.

To create an Import template:

1. Open a Catalog session.
2. In the **Files** or **Media** panel, right click and select **Create import template** from the context menu.



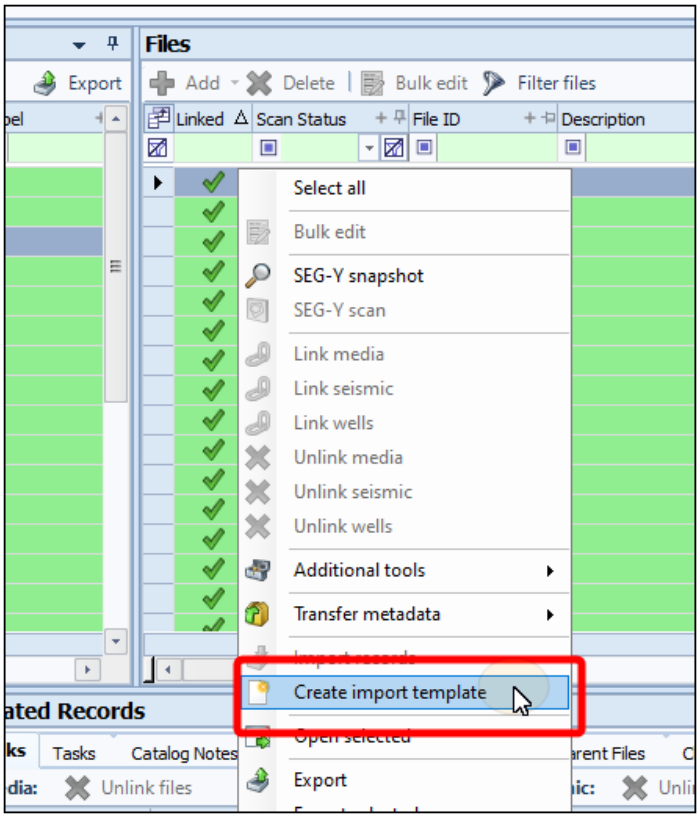
3. The **Import Template Selector** opens.



4. Select between creating a single sheet or multiple sheets. The tool will export columns that can be imported based on the configuration.
5. Click **Save**. The **save file** panel opens.

6. Navigate where you want to save the template, then select **Save**.
7. The template will be saved, and will open in Microsoft Excel.

1. Open a Catalog session.
2. In the **Files** or **Media** panel, right click and select **Create import template** from the context menu.



3. The **save file** panel opens.
4. Navigate where you want to save the template, then select **Save**.
5. The template will be saved, and will open in Microsoft Excel.

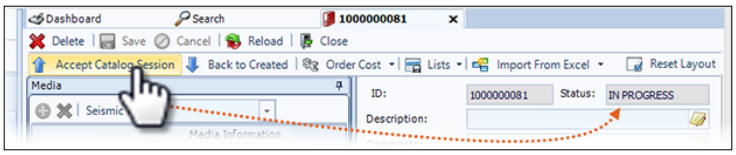
Accept a catalog session

A catalog session in the *Released* status is ready for you to accept and begin the cataloging activities. To begin performing cataloging activities, you must move the session to the *In Progress* status.

To change the status to In Progress:

Open a catalog Session.

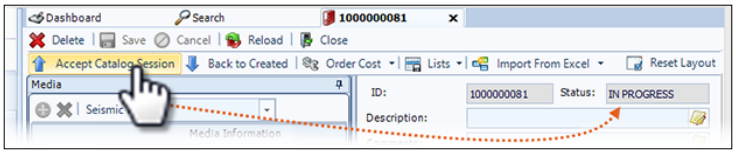
Click **Accept Catalog Session**.



The status of the session changes to *In Progress* and is ready for you to begin the cataloging activities.

A catalog session in the *Released* status is ready for you to accept and begin the cataloging activities. To begin performing cataloging activities, you must move the session to the *In Progress* status.

To change the status to *In Progress*, click **Accept Catalog Session**.



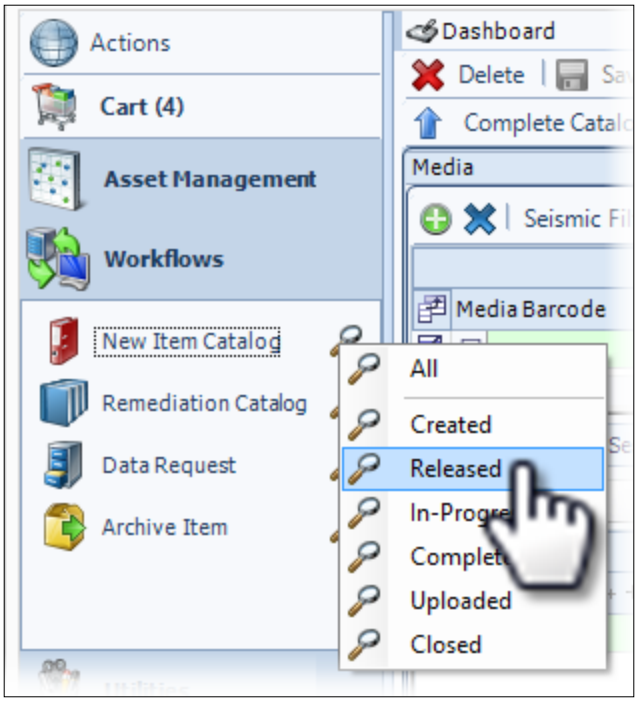
The status of the session changes to **In Progress** and is ready for you to begin the cataloging activities.

Locating a Released session

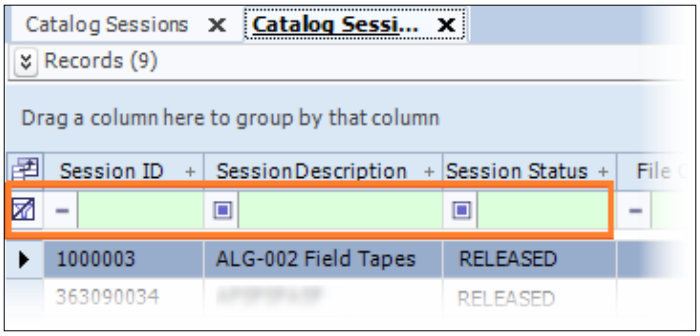
A catalog session in the *Released* status is ready for you to accept and begin the cataloging activities.

To find the released catalog session:

1. Under **Workflows**, click search next to **New Item Catalog**.



2. Select **Released**. The **Search** module opens and display the list of all *Released* catalog sessions.
3. To narrow the results and locate your target catalog session, use the filter row. Type relevant detail in a field in the top row of the grid.



4. Locate the catalog session in the grid and double-click the row to open the session in the **New Item Catalog** module.

Using SEG-Y Scan™

> **Note:**
> **SEG-Y Scan** is available in both the **Catalog** module and the **File** module. These instructions are in reference to the **Catalog** module.

SEG-Y Scan converts your SEG-Y data files into compressed replicas for quick viewing. The scanning process extracts the set of coordinates, data from the EBCDIC header, SEG-Y attributes and SEG-Y cataloging detail. Using the extracted data, Exploration Archives generates images that you can view using SEG-Y SnapShot.

The generated images include:

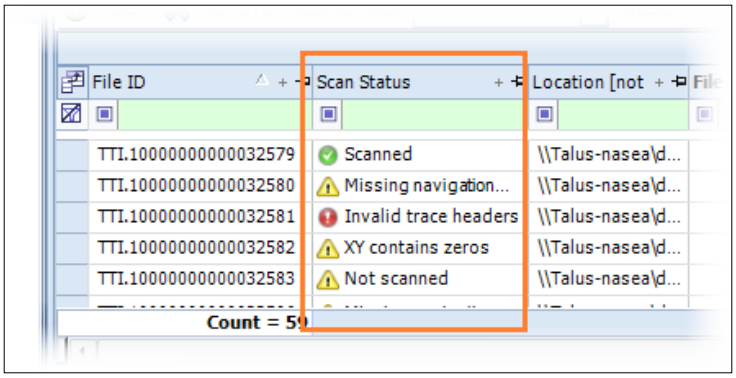
- Live trace outline for each file
- Amplitude map
- Time sections
- Time slice
- Histogram of trace sample values

Identifying the scan status

In the **Catalog** module, the **Scan Status** column in the **Files** grid indicates whether a file has been scanned or not.

Files in a .sgy format are available for scanning and display a status in the **Scan Status** column as follows:

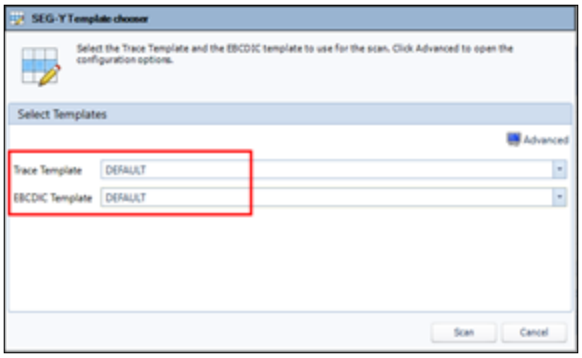
- **Not Scanned**: SEG-Y file has not been scanned
- **Scanned** : File was successfully scanned and outputs are available for viewing in SEG-Y SnapShot
- **Missing Data**: The scan process was unsuccessful because data is missing from the file
- **Missing Navigation Data**: The scan process was unsuccessful because navigation data is missing from the file



Configure SEG-Y Scan templates

SEG-Y Scan converts your SEG-Y data files into compressed replicas for quick viewing. To replicate the files, SEG-Y Scan extracts attribute information from the source files and generates snapshot files for viewing.

The **Trace** template extracts data from the Trace header and the **EBCDIC** template extracts data from the EBCDIC header. The scanning process extracts data from specified locations in the headers, as set in the **Trace** and **EBCDIC** templates.



To extract attribute information, you first create templates to use for scanning the source files. Part of the scanning procedure involves selecting the templates to use for extracting the attributes, and generating the snapshot.

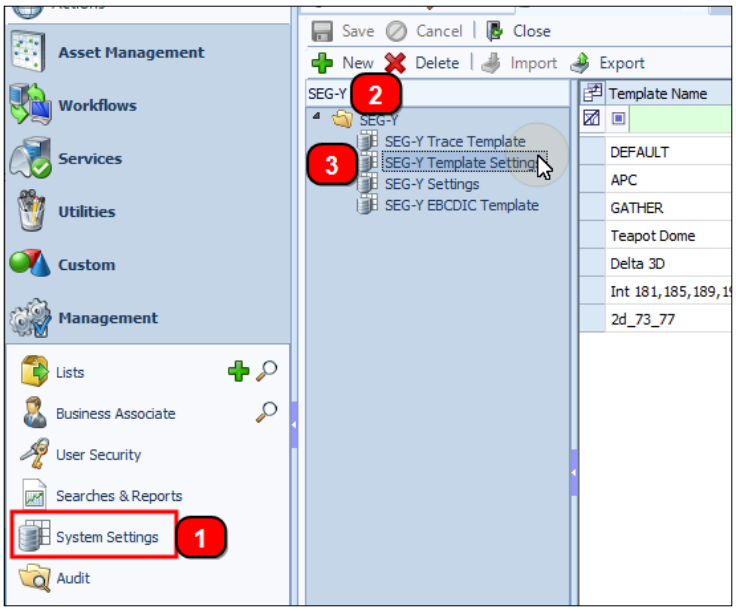
The first step in configuring the templates is to specify the settings for the scan process in when you "Select template settings" below. The next step is to define the following templates:

1. "Define the Trace Template" on page 393: Configure the data locations in the Trace header for the CDPX, CDPY, inline and crossline.
2. "Define the EBCDIC Template" on page 394: Set the card locations for finding and extracting data from the EBCDIC header.

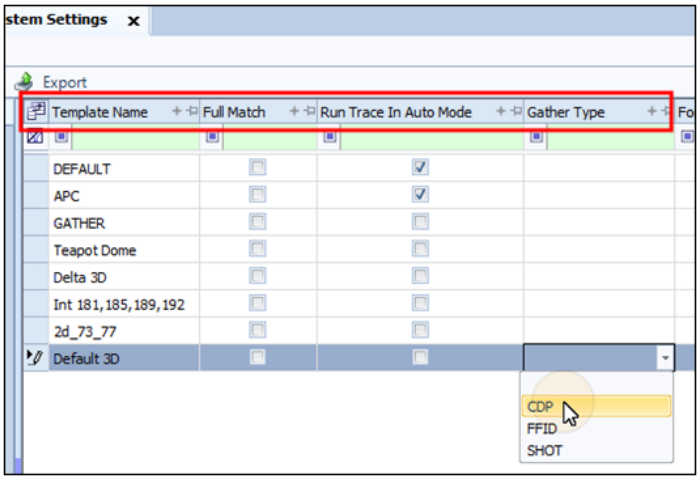
Select template settings

The templates are defined in the **SEG-Y Template Settings** in the **System Settings**.

The first step to specify the scan settings:



1. Under **Management** in the navigation panel, click **System Settings**.
2. Filter the settings to only show **SEG-Y**.
3. From the list, select **SEG-Y Template Settings**. The **SEG-Y Template Settings** grid opens.
4. Click **New**. The grid opens with four columns available to specify settings.



5. In the **Template Name** column, enter an appropriate name.
6. In the **Full Match** column, select to apply to the EBCDIC Template. This setting does not apply to the Trace Template.

> **Note:**
> **Full Match** scans for an exact character match of the data. If an exact match is not found, the scan results indicate as invalid data.

7. In the **Run Trace In Auto Mode** column, select to apply to the Trace Template. This setting does not apply to the EBCDIC Template

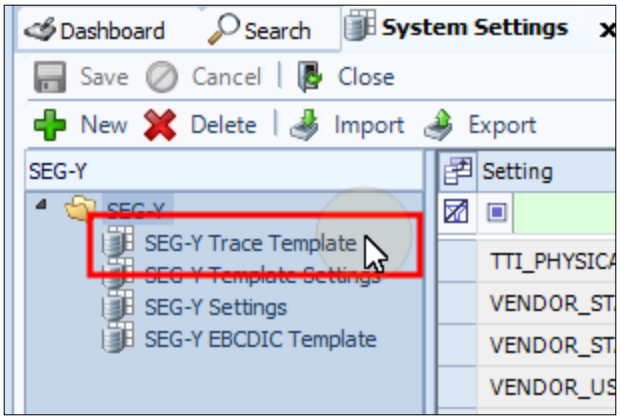
   The Trace Template specifies the location of the CDPX-CDPY and the inline-crossline. Select **Run Trace In Auto Mode** if your template has multiple locations to search for a data match. Auto Mode subsequently scans all locations listed in the template until a match is found. Without Auto Mode, the scan checks only the first instance of each location.

8. For the Trace Template, select the **Gather Type** if applicable. If left blank, the process scans files as pre-stack or post-stack.

Define the Trace Template

The grid for defining a Trace Template is located under **Management** in the **System Settings**.

In the **System Settings** select **SEG-Y Trace Template** to open the configuration grid.



Each row in the template grid specifies one location for an information field to extract and write to the generated snapshot. The first several rows are pre-configured with typical attributes and their locations.

Note:

While a Trace Template can have many locations for extracting data, you must group the attributes in sets of 2 or 4.

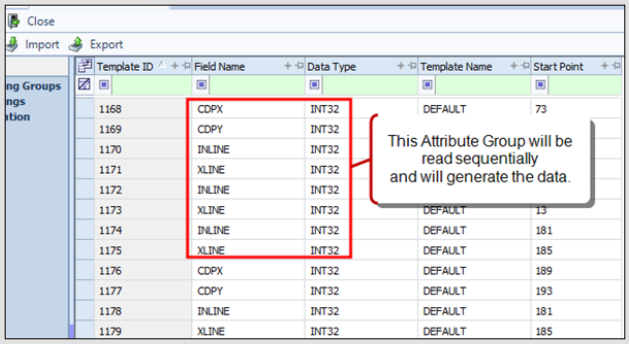
There are a couple of scenarios to remember:

- Where the byte locations are known:

  A set of 2 is used for 2D and a set of 4 is used for 3D.

- The Byte Locations are not known:

  If you want a template to check multiple locations then pick the best, you should group the data:



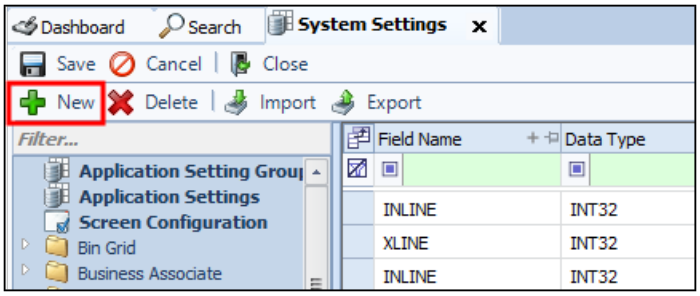
For 2D, you would use multiple sets of x/y pairs.

Be sure that the **Run Trace in Auto Mode** is selected in your SEG-Y Template Settings.

To list locations for multiple sets of data repeat the process for each grouping.

To add data locations:

1. Click **New** to add a new row to the grid.



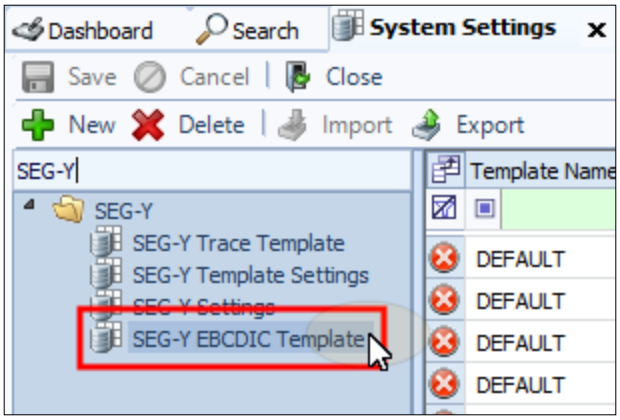
2. In the **Field Name** column, select the attribute .
3. Select the **Data Type**.
4. In the **Template Name** column, select the name of the template to assign the new attribute location.
5. In the **Start Point** column, specify the beginning byte location. SEG-Y Scan calculates the end point automatically based on the data type.
6. Click **Save**.
7. Repeat steps 1-7 to add the remaining data location(s) for your attribute set. Repeat again to add a new set.

If you are adding more than one location for extracting data, be sure that the **Run Trace in Auto Mode** is selected in your SEG-Y Template Settings.

Define the EBCDIC Template

The grid for defining an EBCDIC Template is located under **Management** in the **System Settings**.

In the **System Settings** drop-down options, select **EBCDIC Template** to open the configuration grid.



Each row in the template grid specifies one location for an information field to extract and write to the generated snapshot.

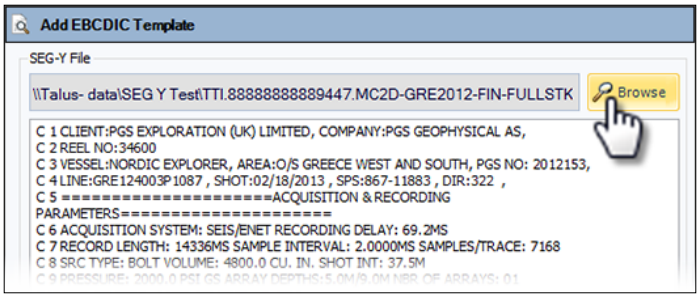
To add the locations of the EBCDIC information to extract:

1. Click **New**. A dialogue message opens for you to confirm if you want to use the template builder.
2. Click **Yes**. The template builder provides assistance with specifying the attribute locations.

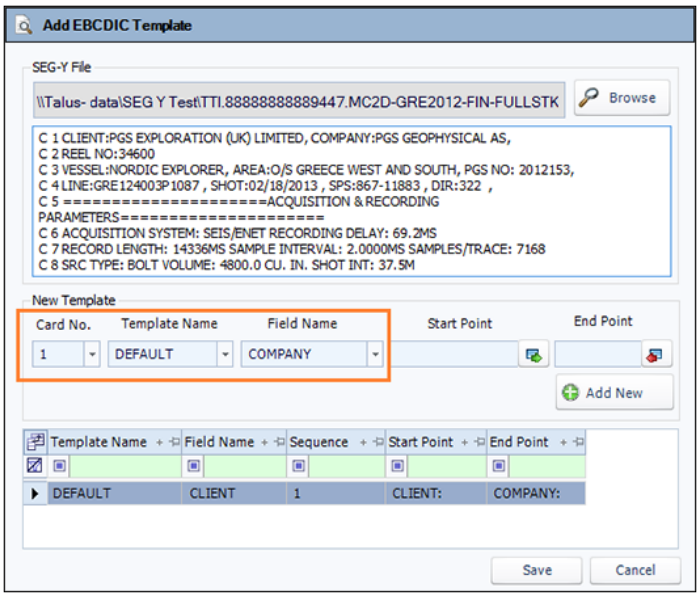
> **Note:**
> As an alternative you can enter the information manually in a new row. Click **No** if you want to add a new row and enter manually.

Using the EBCDIC Template builder:

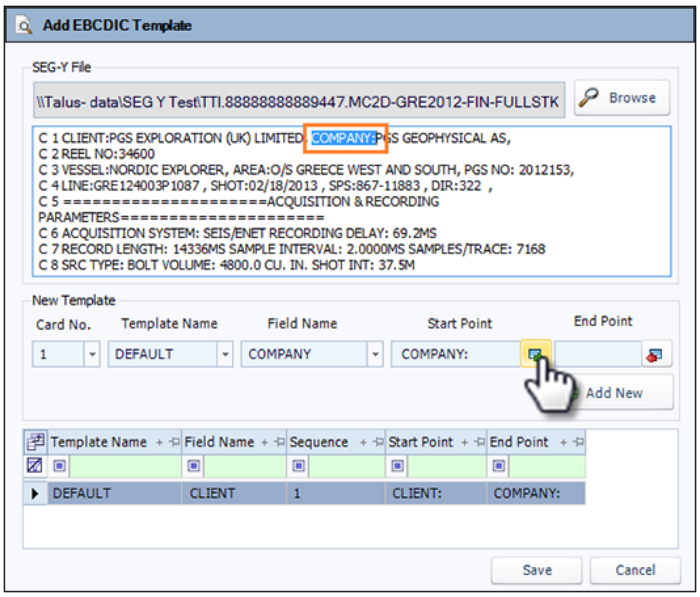
1. In the **Add EBCDIC Template** window, click **Browse**.
2. Browse to the location of your SEG-Y file, select and click **Open**. The text data adds to the template builder for viewing.



3. The **New Template** area provides quick selection options to specify the data extraction locations. Select the **Card No.** for the attribute location.
4. Assign the template pair by selecting the **Template Name** .
5. Select the **Field Name** for the attribute.



6. To specify the character **Start Point** for extracting data, select the text in the viewer and click start point. The selected text pastes to the **Start Point** field. Repeat for the **End Point**.



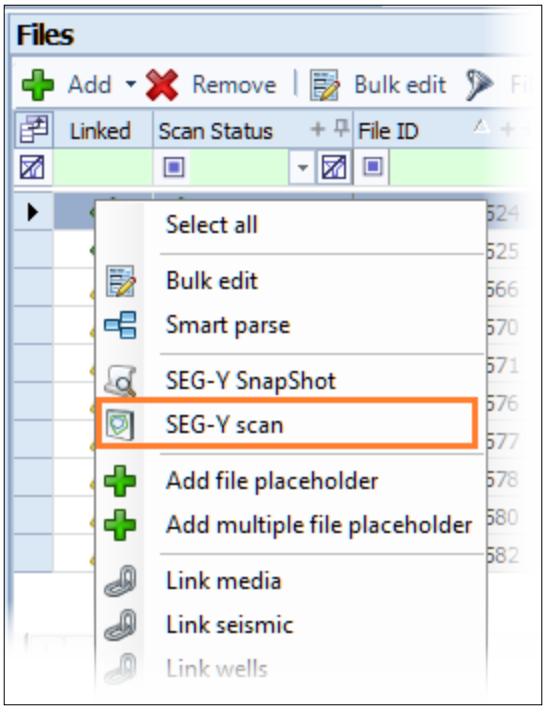
7. Click **Add New**.
8. Repeat steps 3-7 to add all the extraction points. When complete, click **Save**.

Add files to SEG-Y Scan

As part of your cataloging procedures, the files that are in a .sgy format are available for scanning.

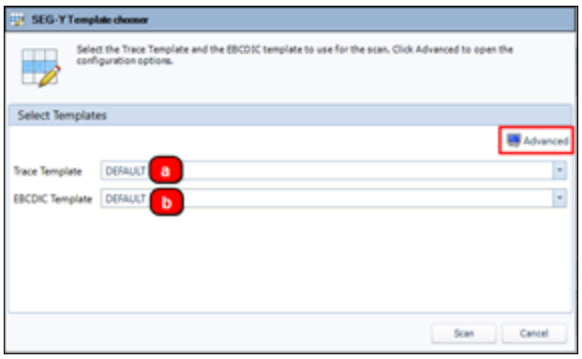
To prepare **SEG-Y Scan** for scanning files:

1. Use one of the following methods to select the files to add to SEG-Y Scan:
   - Click to select one row in the **Files** grid.
   - To select multiple individual rows, press Ctrl while clicking to select.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
2. Right-click on a selected row and click **SEG-Y Scan** in the context menu.



3. The **SEG-Y Template chooser** window opens.
4. When the **SEG-Y Template chooser** window opens it is in the **Basic** scanning mode. In this mode, all the files are scanned with the same Trace and EBCDIC templates.

   To configure a scan in Basic mode:



a. Select the Trace Template from the drop-down list.

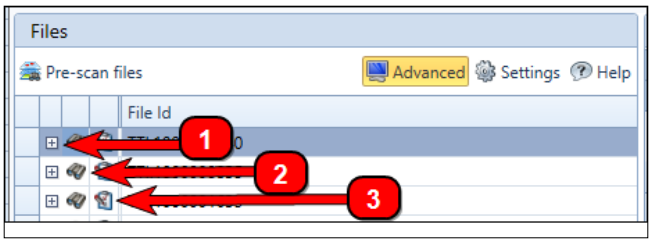
b. Select the EBCDIC Template from the drop-down.

5. Click **Advanced** adjust settings for each selected file.

   The Advanced widow is divided into 3 panels:

   - **Files**:

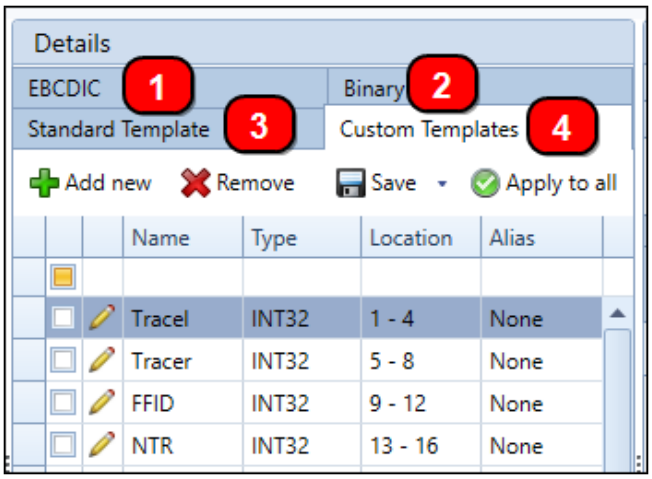
     This panel displays all the records that have been selected for scanning. Each row represents one record. There are 3 icons available with each record:

     1. **Information**: When you select this icon a dialogue will open showing the information for the record.
     2. **Inspection**: Activates the Inspection Process and activates the Quality Control panel. Inspection parses the EBCDIC and Binary Headers and a Trace Header if one is assigned.
     3. **Custom Template**: Overrides the existing Trace Template on the file. This will force the scan to run the file in custom mode using the override.

   - **Details**:

     The Panel is broken into 4 tabs:



1. **EBCDIC**: Displays the EBCDIC Header in ASCII format.
2. **Binary**: Displays the values from the binary header
3. **Standard Template**: Provides the standard byte locations. Select the standards to use for reading the data from the SEG-Y File.

   To save the selected standards to use as a template right-click and select **Add to template**.

   To set an alias to use when generating the spacing and sawtooth validations, right-click and select Set alias and select the alias to use.
4. **Custom Templates**: Displays the trace template details based on your selected template.

   It includes the option to **Add new** or **Remove** templates from the custom list.

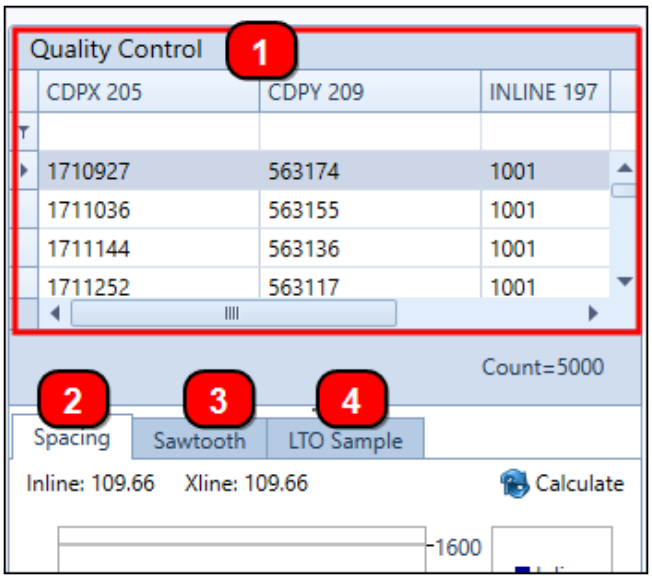
   To save template options to a new template, click the **Save** drop-down and select **Save as new template**.

   Edit an existing template by selecting the Pencil icon.

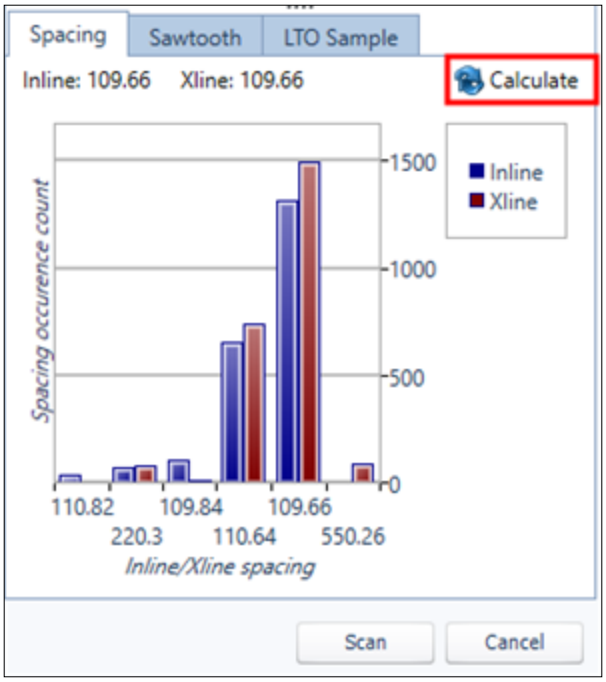
   Select the templates on the list then click **Save**.

» **Quality Control**:

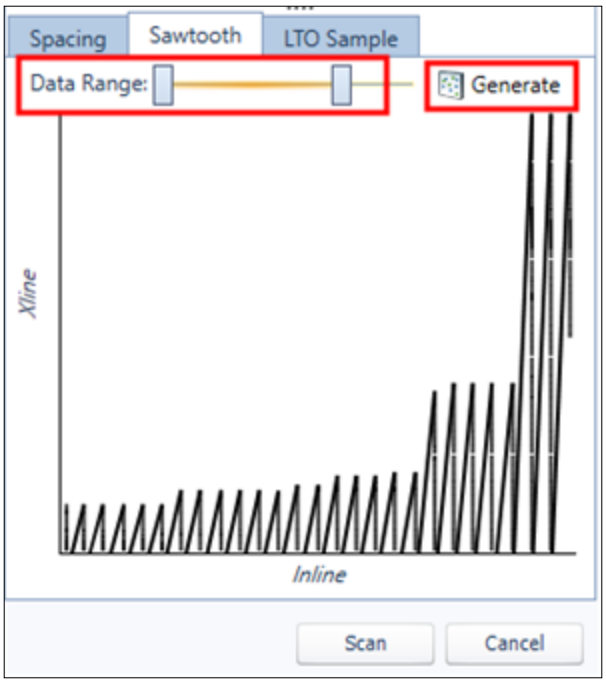
The panel is divided into 4 sections:



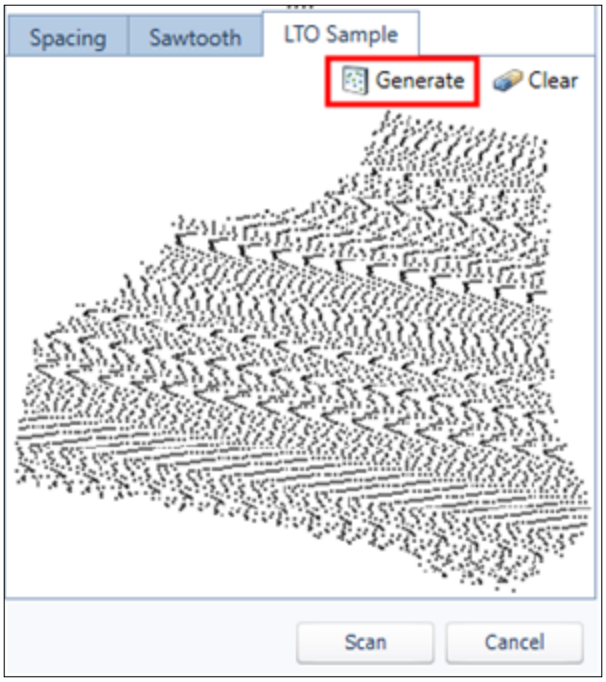
1. **Grid**: The grid displays the trace data from the SEG-Y based on the selected standard and custom templates. The values in this grid are used to generate the spacing and sawtooth charts.
2. **Spacing**: Click **Calculate** to view the spacing on a graph



3. **Sawtooth**: Click **Generate** to see a graphical representation. Use the **Data Range** slider to change the number of traces being used.



4. **LTO Sample**: click Generate to create the sample. To clear the panel, click **Clear**.



To start the scan process, refer to "Starting SEG-Y Scan" on the next page.

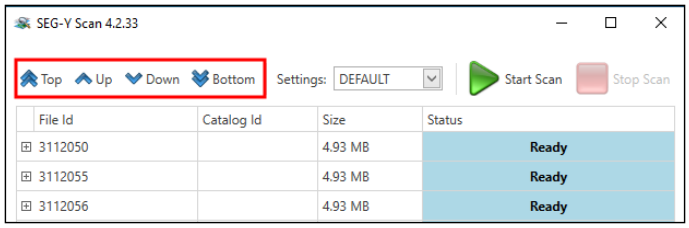
Starting SEG-Y Scan

After adding files to SEG-Y Scan and specifying the settings, you can start the scan process.

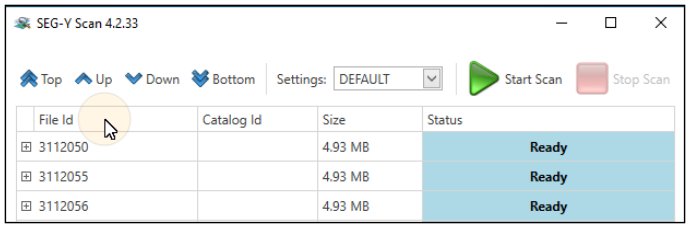
SEG-Y Scan opens with the selected files listed with a **Ready** status.

The application performs the scan in the order that the files are listed. Before starting the scan, you can change the priority order of the files.

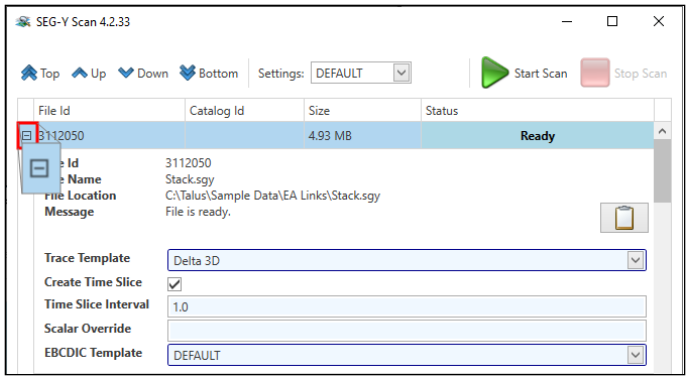
- To move a file to a different priority in the list, select the file move it using the **Top**, **Up**, **Down** and **Bottom** buttons.



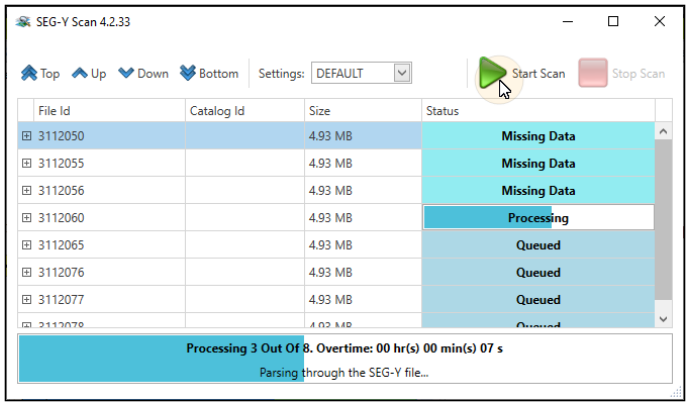
- To display the list either ascending or descending by column category, click the column header.



» To view file details or to change the specified template for a file, click the down arrow in the leader column to expand the file information.



» Click **Start** when you are ready to begin the scan. As the scan progresses, the **Status** column displays the status of each file.



When complete, an information window opens and displays the result details of the scan. Click **OK**. The **SEG-Y Scan** window remains open for you to continue working.

To view the scan results in the **Files** grid, click **Reload** in the workspace toolbar. The **Scan Status** updates in the grid and displays detail for any files that had missing data.

SEG-Y Scan operates independently from Exploration Archives and will not interfere with performance. You can continue working in Exploration Archives while the scan completes.

For quick access to **SEG-Y Scan** while in progress, click on the icon in your taskbar

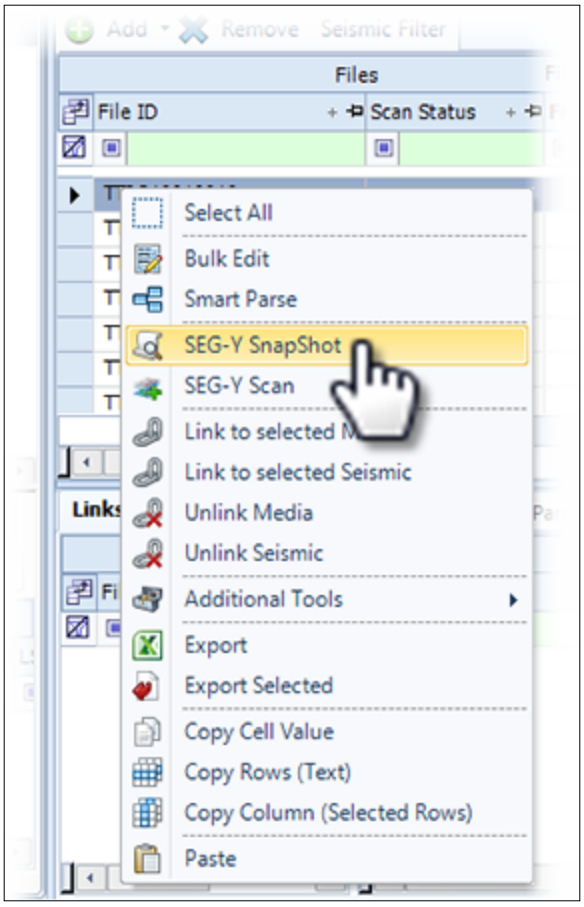
View files with SEG-Y SnapShot

During your cataloging process, you can view your scanned files using SEG-Y SnapShot. While these instructions pertain to the **Catalog** module, SEG-Y SnapShot is also available from the **File** and **Seismic** modules.

Files that appear in the **Files** with a **Scanned** status are available for viewing in **SEG-Y SnapShot**.

To view files in **SEG-Y SnapShot**:

1. Use one of the following methods to select **Scanned** files for viewing:
   - Click to select one row in the **Files** grid.
   - To select multiple individual rows, press Ctrl while clicking to select.
   - To select multiple consecutive rows, click and drag in the leader column in the grid.
2. Right-click on a selected row, point to **Tools** and select **SEG-Y SnapShot** in the context menu.



The **SEG-Y SnapShot** window opens.

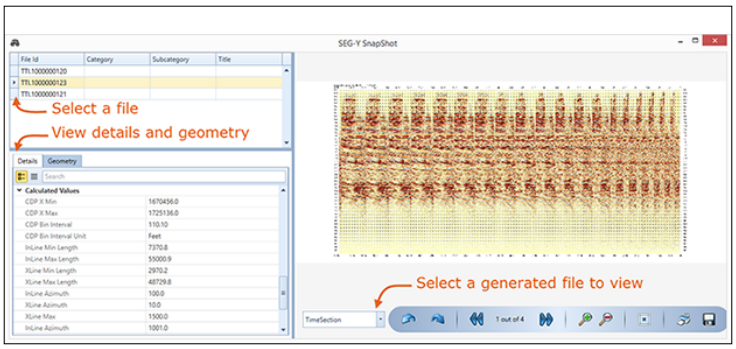
The grid in the upper left displays the files you selected for viewing. Click to select a file to view.

The lower left grid displays the **Details** tab and the **Geometry** tab. Click a tab to view the associated information.

The panel on the right displays the generated snapshot files:

- Time Slice
- Live Trace Outline
- Time Section
- EBCDIC
- Report

Click the drop-down to select a snapshot view. Use the navigation bar to browse, print or save the files.



Use Smart Parse to extract metadata

Smart Parse is an efficient method for assigning details to category fields in the Exploration Archives grids. **Smart Parse** allows you to parse a file name and/or path to look for information that will link the file to media or seismic. It also allows you to set strings of text as various attributes on the file.

You can extract metadata from **Smart Parse** to:

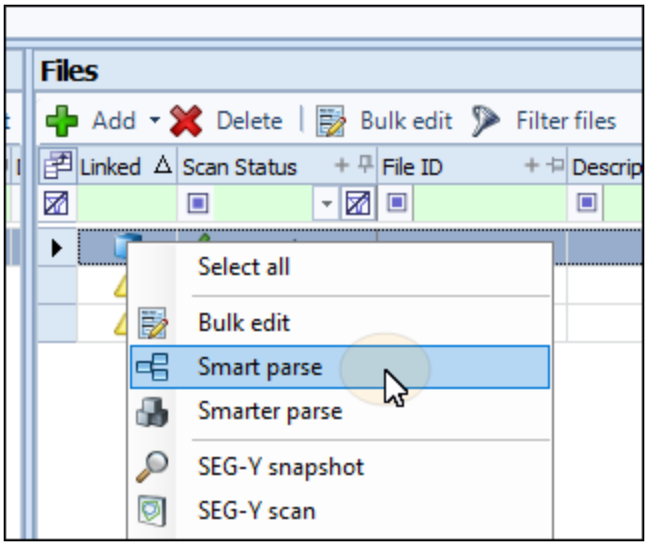
- Link files to media based on barcode.
- Link files to seismic based on the seismic name.
- Set the **Title** field.
- Set the **Description** fields.
- Assign the **Category** and **Sub-category**.

To open **Smart Parse**:

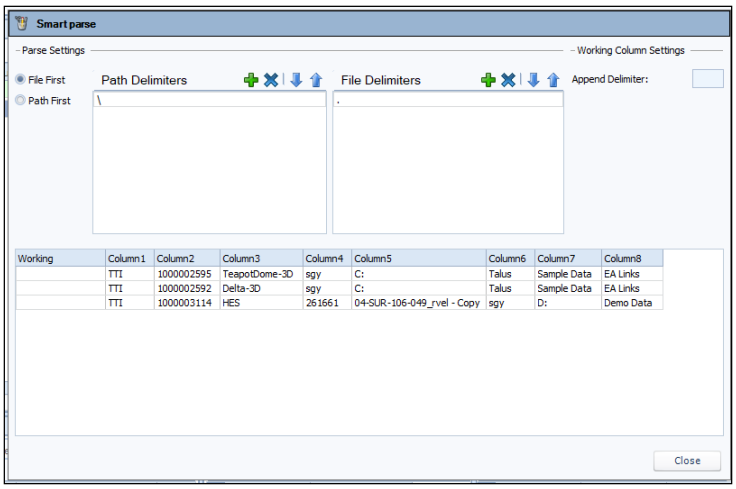
1. Start a catalog session. In the **Files** grid, select the file rows to be parsed.

> **Tip:**
> Use **Ctrl+Shift** to select multiple rows that are not grouped together.

2. Right-click and select **Smart Parse**.



The **Smart Parse** window opens with segments of the file path (metadata) divided into columns.

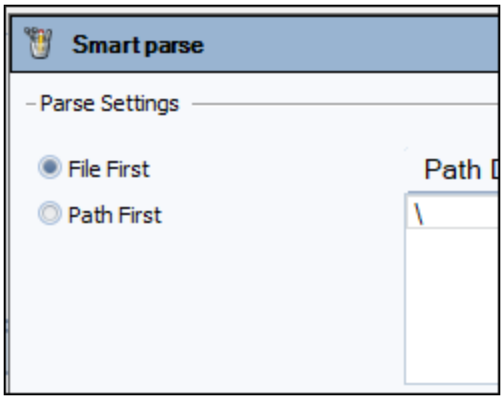


Set parse delimiters

Smart Parse extracts text as metadata from the file name and the file path. The metadata displays in a grid for you to access and assign to different columns. You can set the parameters for the delimiters and adjust how the metadata parses into the

columns.

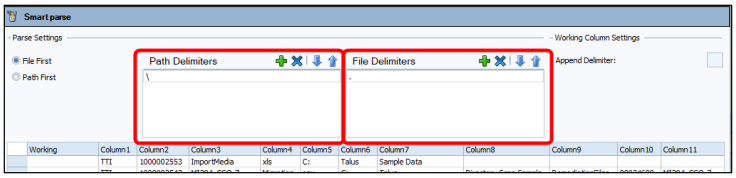
The metadata extracts from the file name and the file path. Under **Parse Settings**, select which one you want to display first (left-most) in the grid.



Determine how you want the file path and the file name to be segregated. Specify the delimiters for **Smart Parse** to use by adding them to **Path Delimiters** and **File Delimiters** fields.

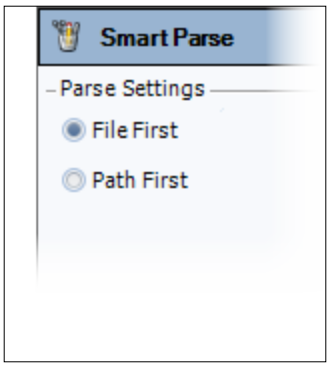
If required, enter multiple delimiters. For example, enter **.-** to parse the metadata according to periods and hyphens.

Click the arrows to adjust the order of the delimiters.



Smart Parse extracts text as metadata from the file name and the file path. The metadata displays in a grid for you to access and assign to different columns. You can set the parameters for the delimiters and adjust how the metadata parses into the columns.

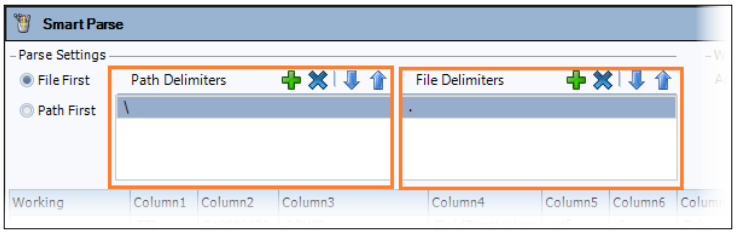
The metadata extracts from the file name and the file path. Under **Parse Settings**, select which one you want to display first (left-most) in the grid.



Determine how you want the file path and the file name to be segregated. Specify the delimiters for **Smart Parse** to use by adding them to **Path Delimiters** and **File Delimiters** fields.

If required, enter multiple delimiters. For example, enter **.-** to parse the metadata according to periods and hyphens.

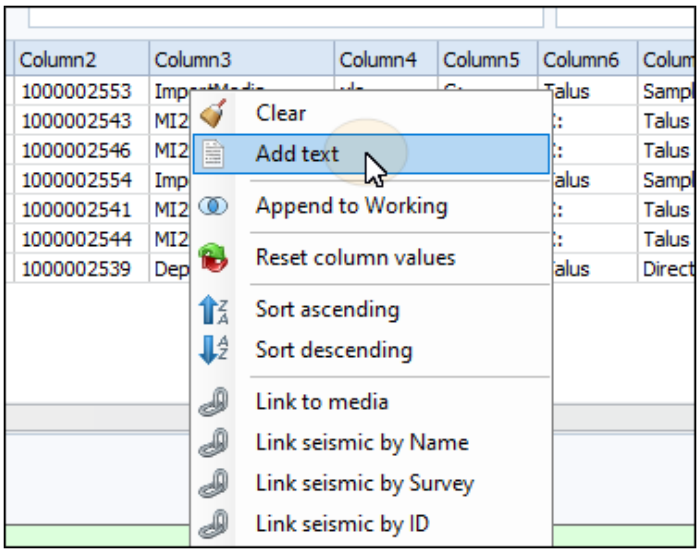
Click the arrows to adjust the order of the delimiters.



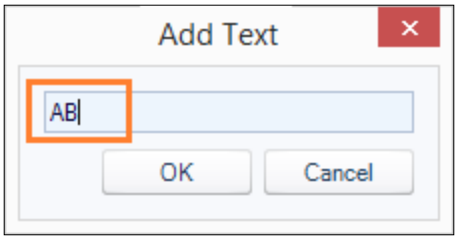
Add to column text

If the values in a column require additional text for the metadata, use the **Add Text** function.

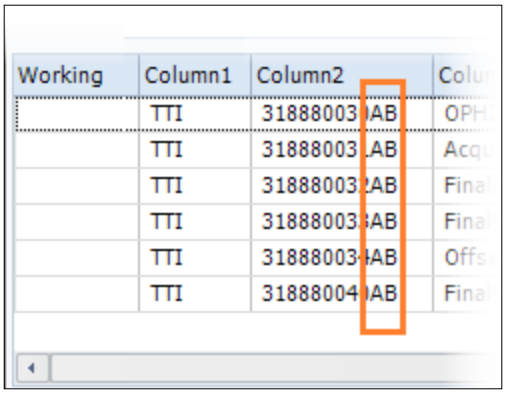
1. Right-click on the target column to open the context menu. Click **Add Text**.



2. In the **Add Text** window, enter the text you want to add to the column text and click **OK**.



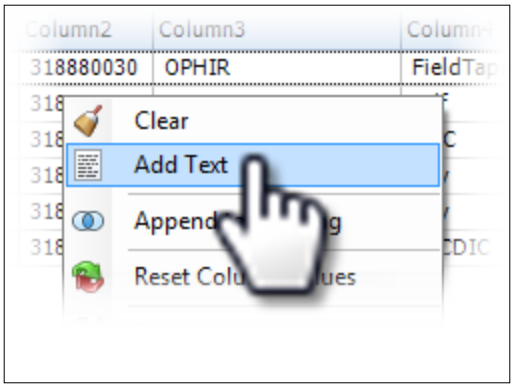
The additional text appends to the current text of all fields in the target column.



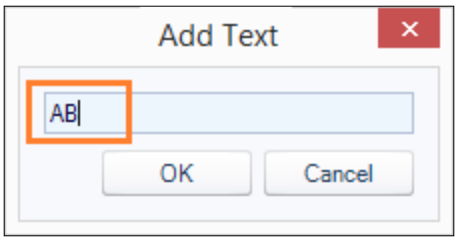
3. Click **Close** to commit the changes to the main grid.

If the values in a column require additional text for the metadata, use the **Add Text** function.

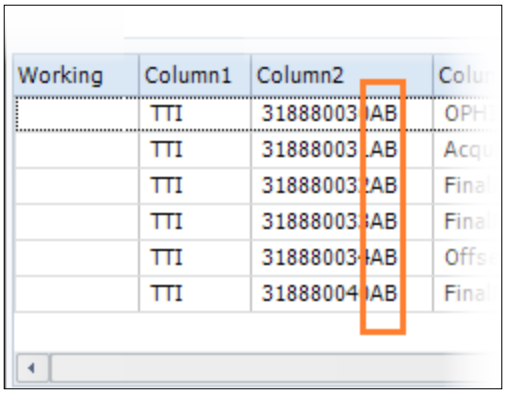
1. Right-click on the target column to open the context menu. Click **Add Text**.



2. In the **Add Text** window, enter the text you want to add to the column text and click **OK**.



The additional text appends to the current text of all fields in the target column.



3. Click **Close** to commit the changes to the main grid.

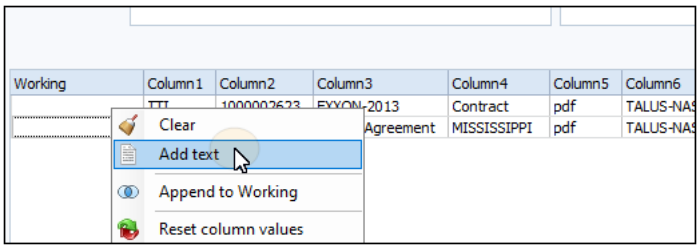
Create custom metadata

The information generated in the columns of the **Smart Parse** grid can be manipulated to produce useful metadata.

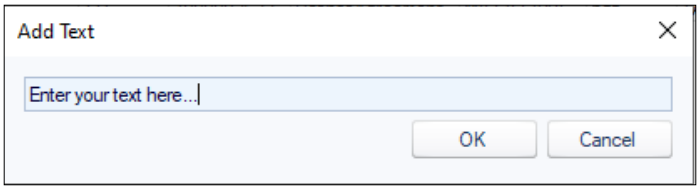
The **Working** column is for manually entering text as metadata, combining values from other columns and assigning the custom text as metadata.

To manually add text:

1. Right-click on the **Working** column then select **Add Text** from the context menu.



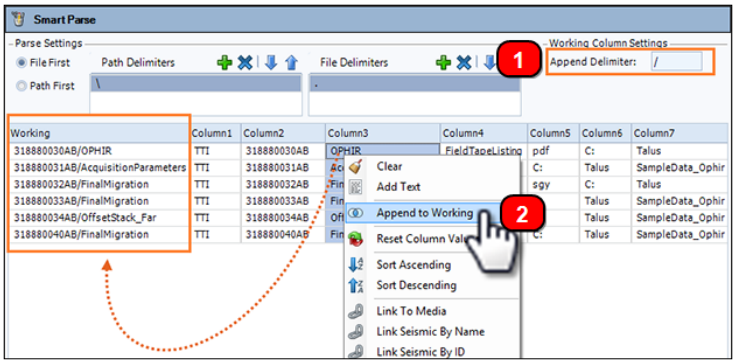
2. Enter the text



3. Click **OK**.

If the required metadata is segregated across multiple columns, combine the text into the **Working** column using the **Append to Working** function.

To use Append to Working:



1. Using a delimiter will add a dividing character between the information added to the **Working** column. To add a delimiter, enter a delimiter character in the **Append Delimiter** field.

2. To add data from the grid to the **Working** column, right-click on the column with the text and select **Append to Working**. The values will populate in the **Working** column. Add as many column values as required. If you specified a delimiter, each value added will be separated by the specified character.

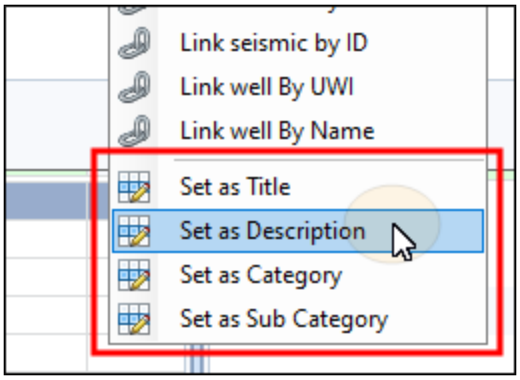
When the text in the **Working** column represents sufficient metadata, assign the value.

See "Assign parsed metadata" on the next page.

Assign parsed metadata

To use **Smart Parse** for assigning metadata:

1. In the **Files** grid, select the rows to be parsed. Use Ctrl to select multiple rows.
2. Right-click and **Smart Parse**. The **Smart Parse** window opens with segments of the file path divided into columns.
3. Right-click on the column with the target metadata to be assigned.
4. Select the option to apply:



   - **Set as Title**
   - **Set as Description**
   - **Set as Category**
   - **Set as Sub Category**

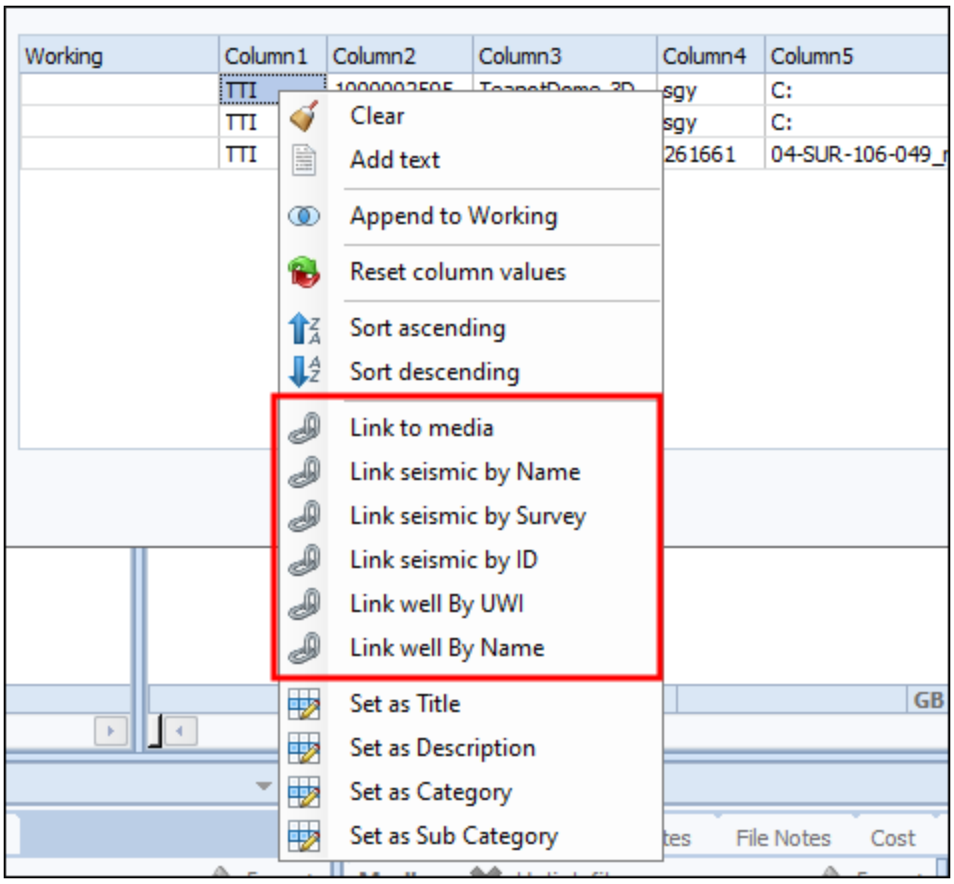
5. Click **Close** to commit the changes to the main grid.

Link files with Smart Parse

The context menu in **Smart Parse** includes actions for linking files.

To link files:

Right-click on the column and select the appropriate linking:



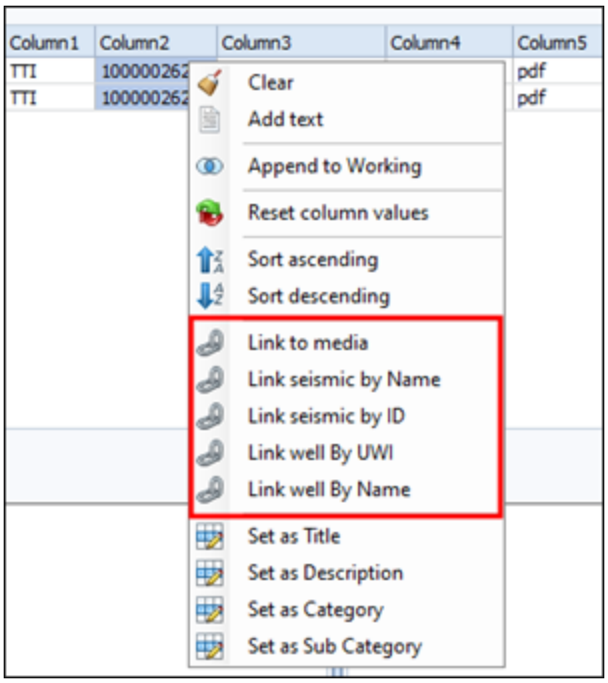
- **Link to Media**: uses the target column as the barcode for linking to media items.
- **Link Seismic by Name**: uses the target column as the seismic name for linking to seismic.
- **Link seismic by Survey**: uses the file path or file name to generate links by searching by the **survey name** field.
- **Link Seismic by ID**: uses the target column as the seismic ID for linking to seismic.
- **Link Well by UWI**:uses the target column as the UWI for linking to Wells.
- **Link Well by Name**: uses the target column to link to a well by name.

Click **Close** to commit the changes.

The context menu in **Smart Parse** includes actions for linking files.

To link files:

Right-click on the column and select the appropriate linking:



- **Link to Media**: uses the target column as the barcode for linking to media items
- **Link Seismic by Name**: uses the target column as the seismic name for linking to seismic
- **Link Seismic by ID**: uses the target column as the seismic ID for linking to seismic
- **Link Well by UWI**:uses the target column as the UWI for linking to Wells
- **Link Well by Name**: uses the target column to link to a well by name

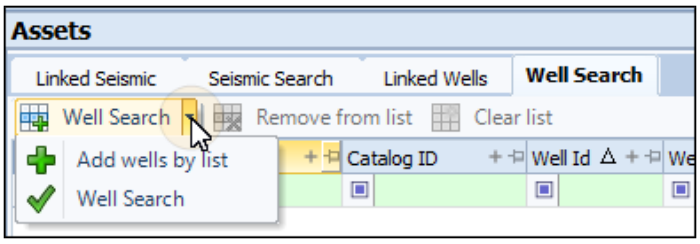
Click **Close** to commit the changes.

Link Files to Wells

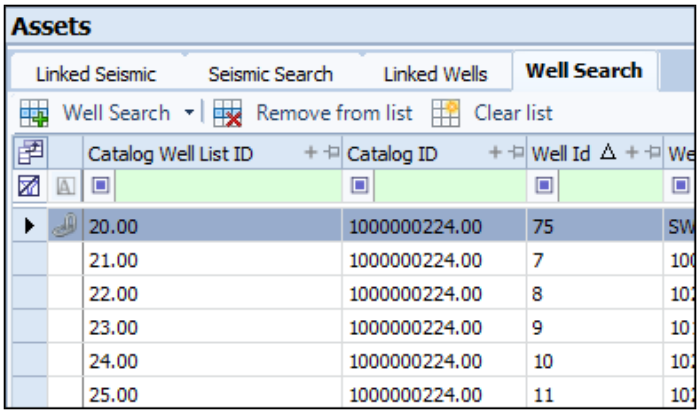
The **Assets** panel of the **Catalog** module is a working space for searching and linking Wells to files in a catalog session. You can link Well to any file.

To locate the well(s) to link to a file, use the **Assets** panel:

1. In the **Wells Search** tab of the **Assets** panel, click **Well Search** and select a search category from the drop-down menu.



2. The search window opens. Enter your search criteria then click **Search**.
3. The items add to the **Well Search** grid.



The Catalog module offers 2 methods for linking files and wells; a drag and drop action and a context menu command.

Option 1: Use drag and drop to link files to wells

The drag and drop method is reciprocal. Dragging from the **Well Search** tab to the **Files** grid produces the same results as dragging from **Files** to **Well Search**.

1. Click to select an item from the **Well Search** tab.
2. Click and hold the Well. Drag and drop to the file in the **Files** grid.

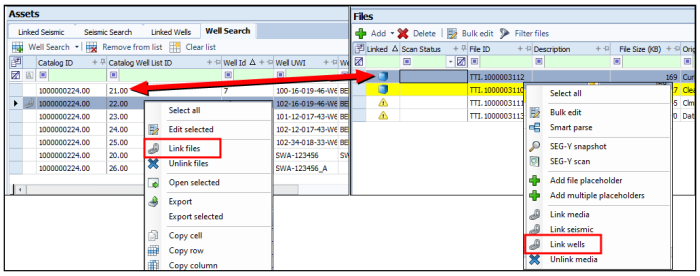
   The **Linked** columns update in each grid to show the linked icon.

Option 2: Use the context menu to link files to Well

The linking action is reciprocal. The **Link files** action from the **Well Search** tab and the **Link Wells** action from the **Files** grid produce the same results.

1. Click to select the Well in the **Well Search** tab.
2. In the **Files** grid, select the item(s) associated to the Well.
3. Right-click in the **Well Search** tab to open the context menu. Select **Link files**.
   The **Linked** columns update in each grid to show the linked icon.
   The **Links** tab in the **Related Records** panel displays the Well linked to a file selected in the **Files**

grid.

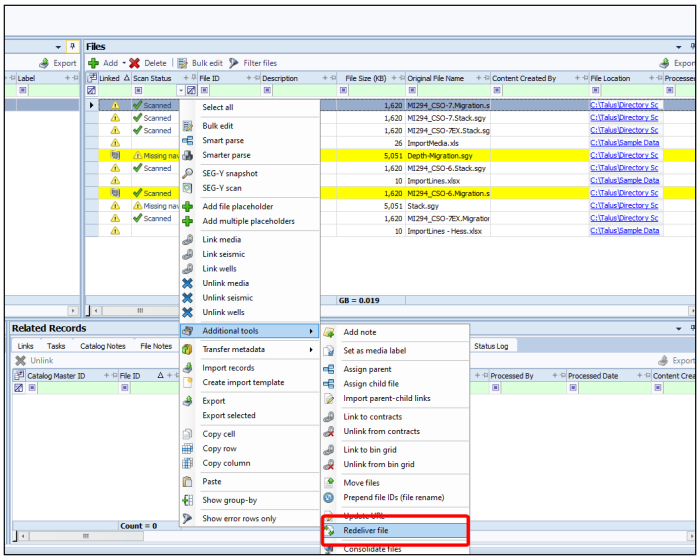


Redeliver File

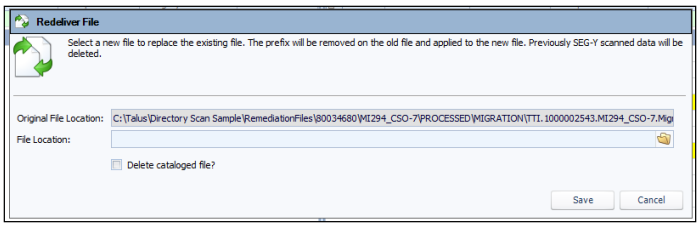
You can redeliver files to have their file location and size updated by another selected file. The File prefixes will be removed from the old file and re-applied to the new file. The tool does not allow using a file already prefixed with the current system prefix.

To redeliver a file:

1. Open a Catalog Session. In the files panel, right click and select **Additional Tools>Redeliver file** from the context menu.



2. The **Redeliver File** dialogue panel opens.



3. Enter the path to file that is replacing the current file. You can also click the file open button and navigate to the file location.

   Optionally, you can select the **Delete cataloged file?** checkbox. This will delete the current file.

   Note: Existing SEG-Y scan data in the database and output files will also be deleted.

4. Click **Save**. The operation will be completed.

Once complete, a log entry will be recorded in the FILE_REDELIVERY_LOG containing details of the original file and new file.

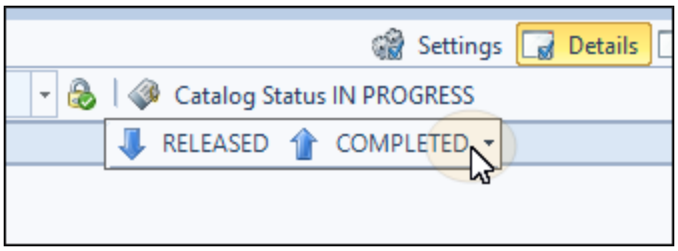


Advance to Completed status

After adding the relevant detail, files and media, your catalog session is ready to move to the **Completed** status. In the **Completed** status, the session is ready for quality control (QC) procedures.

To advance a catalog session to **Completed** status:

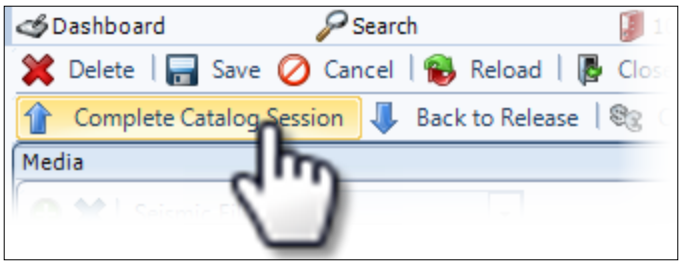
1. Open a Catalog session in **edit view**.
2. Select **Completed** from the **Catalog Status** drop down.



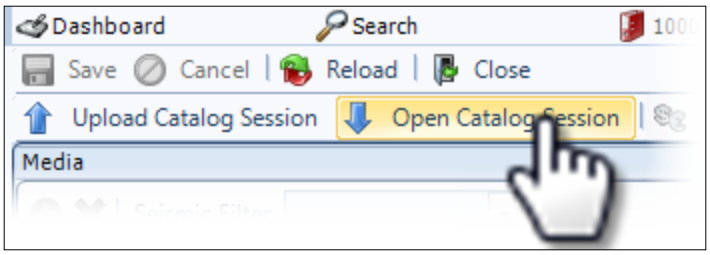
3. The system will validate the status. Errors will be displayed and the Catalog status will remain as In Progress until the errors are fixed.

After adding the relevant detail, files and media, your catalog session is ready to move to the **Completed** status. In the **Completed** status, the session is ready for quality control (QC) procedures.

To advance a catalog session to **Completed** status, click **Complete Catalog Session**.



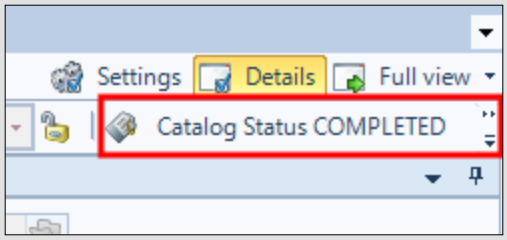
If the session fails QC, click **Open Catalog Session**. The status changes back to **In Progress** for the person responsible to correct the data.



Upload a catalog session

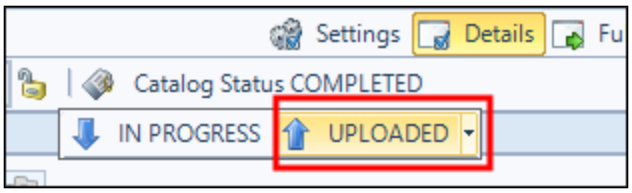
After passing quality control (QC), the session is ready for you to upload to production. The data becomes available to users after being uploaded.

> **Note:**
> The Catalog Status needs to be set to **Completed**.



To upload to production:

1. Click the Catalog Status when **Completed**.
2. Click **Uploaded**.

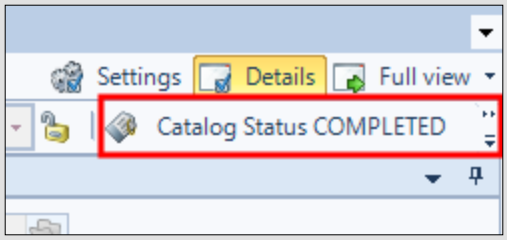


3. The status changes to **Uploaded**.

The files in an **Uploaded** catalog session are available for moving to Production. Refer to "Move files to production" on the next page.

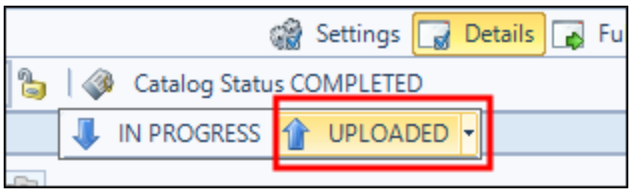
After passing quality control (QC), the session is ready for you to upload to production. The data becomes available to users after being uploaded.

Note:
The Catalog Status needs to be set to **Completed**.



To upload to production:

1. Click the Catalog Status when **Completed**.
2. Click **Uploaded**.



3. The status changes to **Uploaded**.

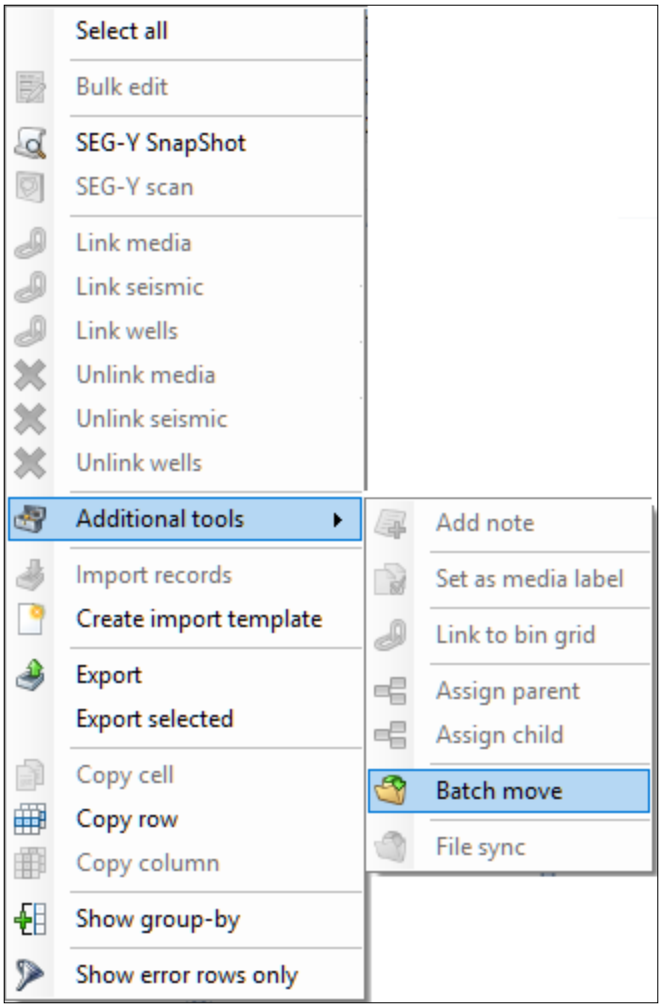
The files in an **Uploaded** catalog session are available for moving to Production. Refer to "Move files to production" below.

Move files to production

To move files to production, use the **Batch Move** tool.

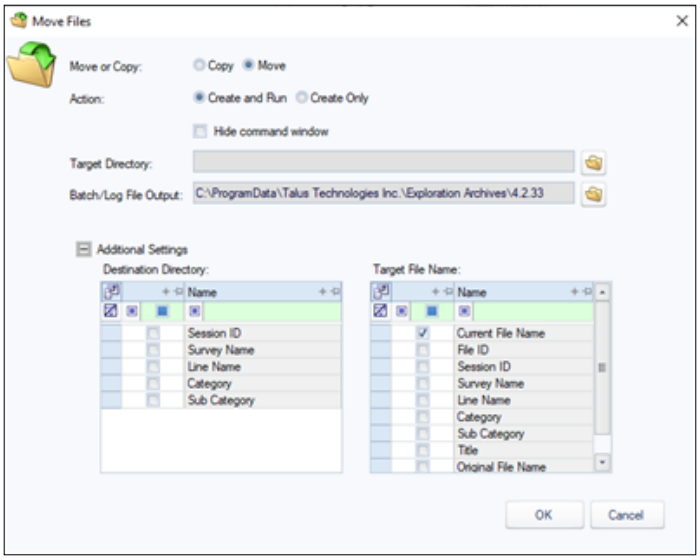
Open the **Uploaded** catalog session and find the files to be moved in the **Files** grid.

1. Click to select the files to be moved.
2. Right-click to open the context menu and point to **Additional Tools>Batch Move**.



The **Move Files** window opens.

3. In the **Move Files** window, set the following criteria:



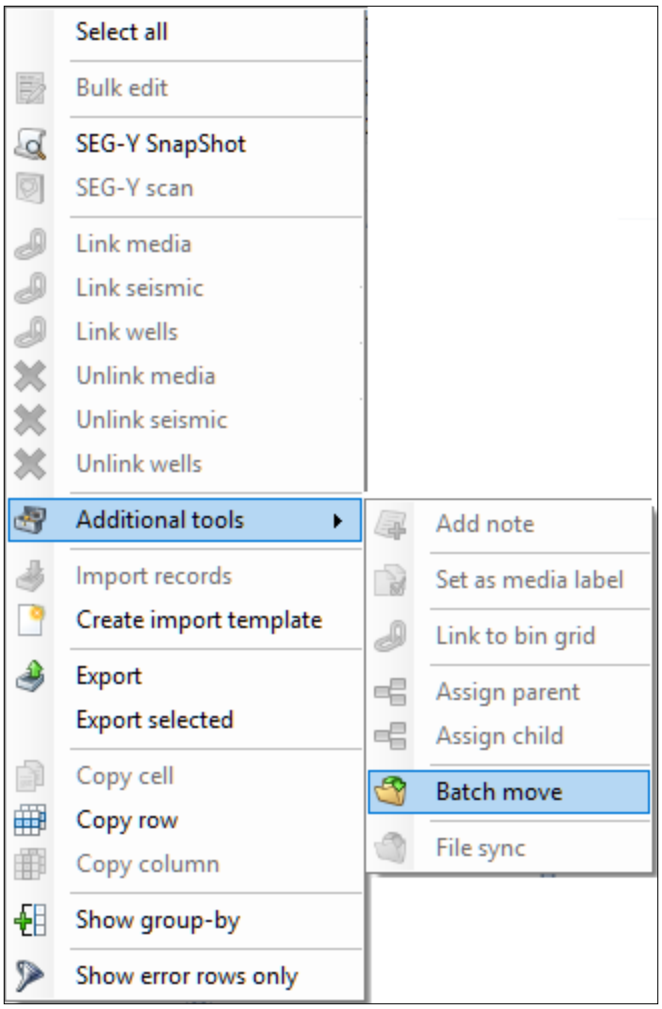
   - **Move or Copy**: Select **Move**.
   - **Action**: Select **Create and Run**.
   - **Target Directory**: Browse to and select the appropriate production location.
   - **Batch/Log File Output**: Browse to and select the appropriate output location.
   - **Additional Settings**: Select the **Destination Directory** and the category to use for the **Target File Name**.
4. Click **OK**. The files move to the specified folder.
5. Open the originating folder (or staging folder) to verify that the files moved correctly.

To move files to production, use the **Batch Move** tool. Open the **Uploaded** catalog session and find the files to be moved in the **Files** grid.

New in this version:

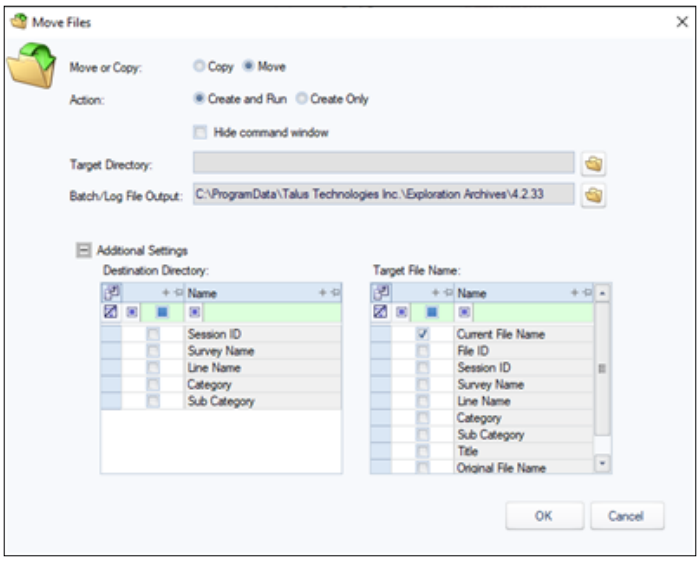
- The target file name will default to **Current File Name**.
- Now allows a folder structure with **SeismicName_SeismicID**.
- You can now create a directory listing as part of the copy process.

1. Click to select the files to be moved.
2. Right-click to open the context menu and point to **Additional Tools>Batch Move**.



The **Move Files** window opens.

3. In the **Move Files** window, set the following criteria:

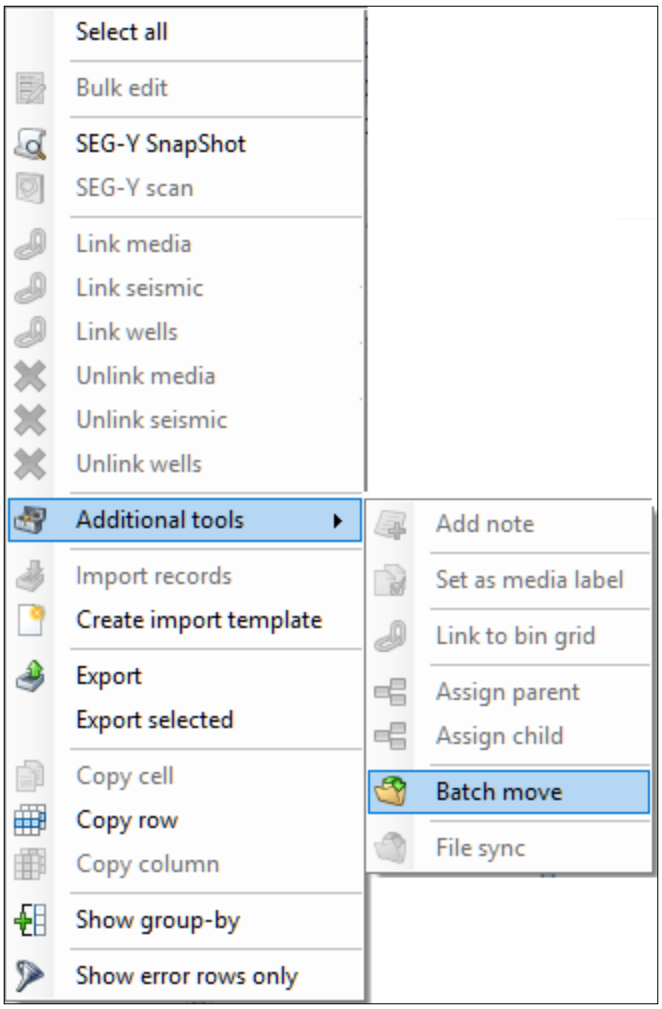


- **Move or Copy**: Select **Move**.
- **Action**: Select **Create and Run**.
- **Target Directory**: Browse to and select the appropriate production location.
- **Batch/Log File Output**: Browse to and select the appropriate output location.
- **Additional Settings**: Select the **Destination Directory** and the category to use for the **Target File Name**.

4. Click **OK**. The files move to the specified folder.
5. Open the originating folder (or staging folder) to verify that the files moved correctly.

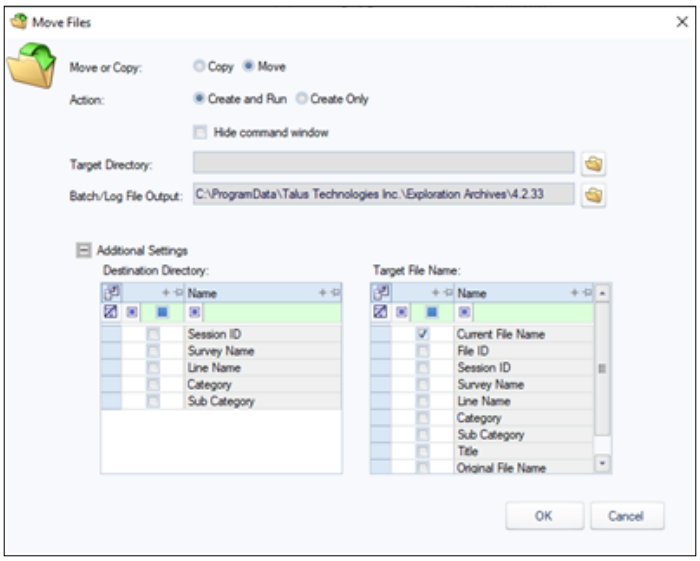
To move files to production, use the **Batch Move** tool. Open the **Uploaded** catalog session and find the files to be moved in the **Files** grid.

1. Click to select the files to be moved.
2. Right-click to open the context menu and point to **Additional Tools>Batch Move**.



The **Move Files** window opens.

3. In the **Move Files** window, set the following criteria:

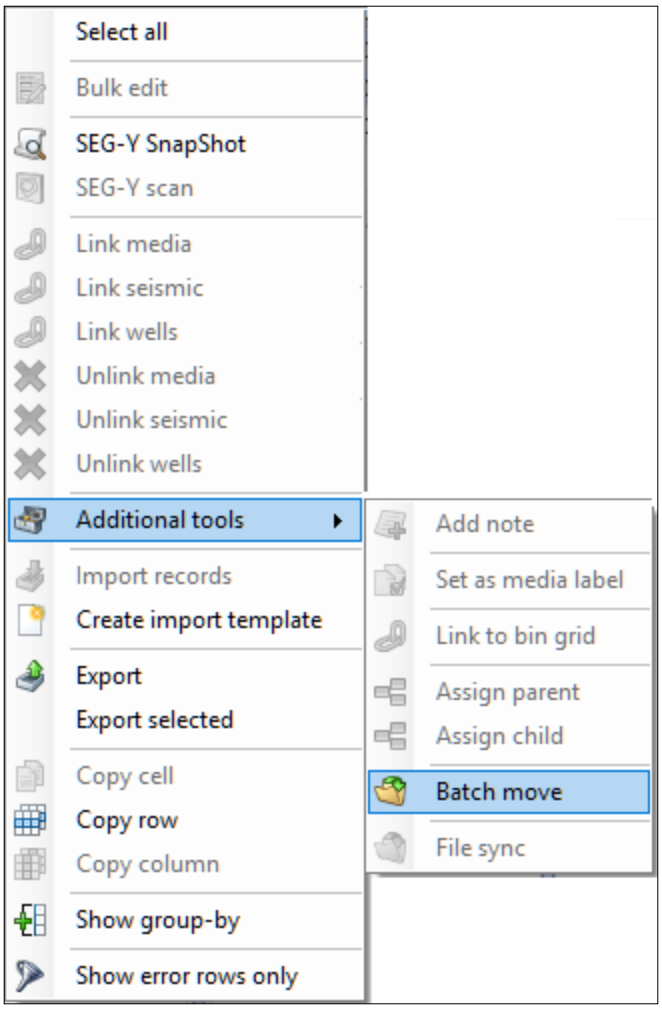


- **Move or Copy**: Select **Move**.
- **Action**: Select **Create and Run**.
- **Target Directory**: Browse to and select the appropriate production location.
- **Batch/Log File Output**: Browse to and select the appropriate output location.
- **Additional Settings**: Select the **Destination Directory** and the category to use for the **Target File Name**.

4. Click **OK**. The files move to the specified folder.
5. Open the originating folder (or staging folder) to verify that the files moved correctly.

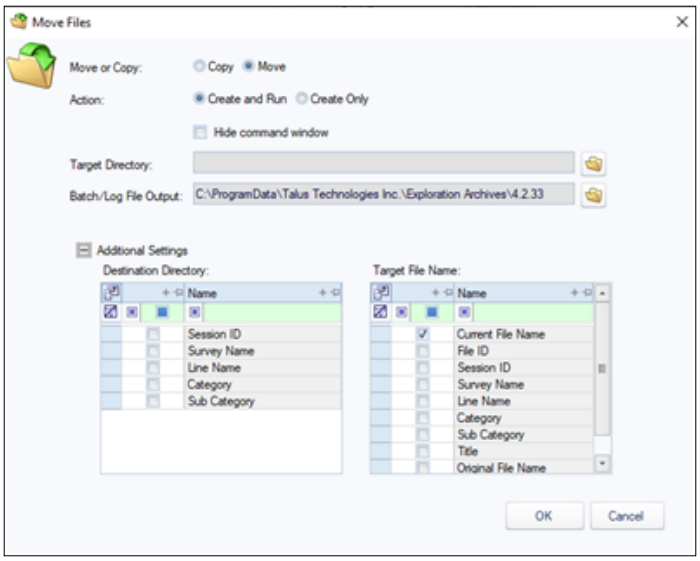
To move files to production, use the **Batch Move** tool. Open the **Uploaded** catalog session and find the files to be moved in the **Files** grid.

1. Click to select the files to be moved.
2. Right-click to open the context menu and point to **Additional Tools>Batch Move**.



The **Move Files** window opens.

3. In the **Move Files** window, set the following criteria:



- **Move or Copy**: Select **Move**.
- **Action**: Select **Create and Run**.
- **Target Directory**: Browse to and select the appropriate production location.
- **Batch/Log File Output**: Browse to and select the appropriate output location.
- **Additional Settings**: Select the **Destination Directory** and the category to use for the **Target File Name**.

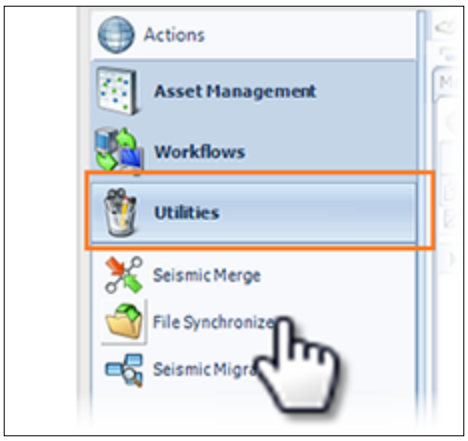
4. Click **OK**. The files move to the specified folder.
5. Open the originating folder (or staging folder) to verify that the files moved correctly.

Synchronize files

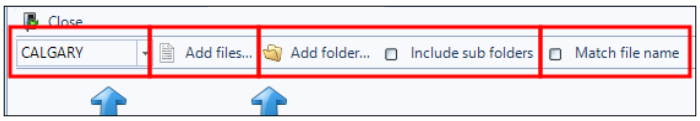
After moving files to a production folder, the new file location must be synchronized with Exploration Archives.

To synchronize (sync) the files:

1. In the navigation panel, under **Utilities**, click **File Synchronize**.
   The **File Synchronize** module opens in the workspace panel.



2. In the drop-down option, select the server that you want to add files or folders from. In the sample image, the server CALGARY is selected.



3. Add files:

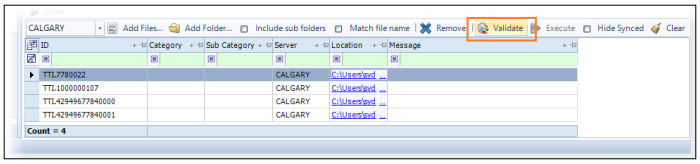
» To add individual files, click **Add Files**. Browse to the file location and select the files. Hold Ctrl to select multiple files.

» To add all files within a folder select **Add Folder**.

» To include the sub folders, select **Include sub folders** and then click **Add Folder**. Navigate to the folder and select to add. A grid populates in the workspace with the specified files listed.

» **Match file name** checks that the file names are the same.

4. Click **Validate** to verify that the specified files exist in the Exploration Archives production tables.



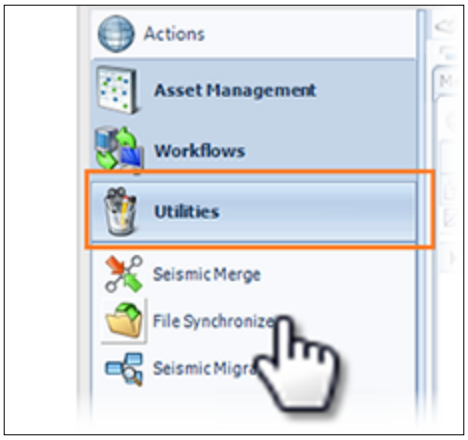
5. Check the **Message** column for errors and correct all errors before proceeding.
6. The **Execute** button becomes available when no errors exist. Click **Execute** to complete the process.

To filter the files remaining to be synced only, click the **Hide Synced** button.

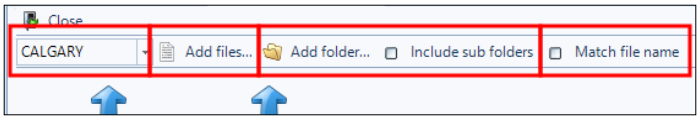
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To synchronize (sync) the files:

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3. Add files:

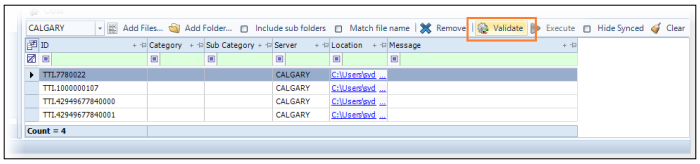
» To add individual files, click **Add Files**. Browse to the file location and select the files. Hold Ctrl to select multiple files.

» To add all files within a folder select **Add Folder**.

» To include the sub folders, select **Include sub folders** and then click **Add Folder**. Navigate to the folder and select to add. A grid populates in the workspace with the specified files listed.

» **Match file name** checks that the file names are the same.

4. Click **Validate** to verify that the specified files exist in the Exploration Archives production tables.



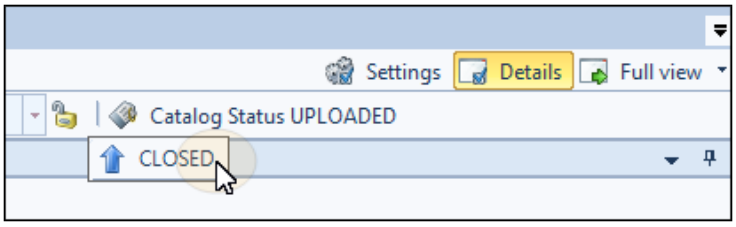
5. Check the **Message** column for errors and correct all errors before proceeding.
6. The **Execute** button becomes available when no errors exist. Click **Execute** to complete the process.

To filter the files remaining to be synced only, click the **Hide Synced** button.

Close a catalog session

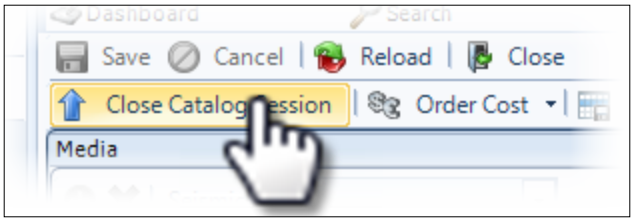
The catalog session is ready to be closed after the spinning disk files are moved and synchronized, and all other media have been sent to hierarchical storage management (SM).

To close a catalog session ,select CLOSED from the **Catalog Status** .



The catalog session is ready to be closed after the spinning disk files are moved and synchronized, and all other media have been sent to hierarchical storage management (SM).

To close a catalog session, click **Close Catalog Session**.



4.4 Data Request

The **Data Request** module in Exploration Archives Desktop is used for ordering products and tracking the movement of your data.

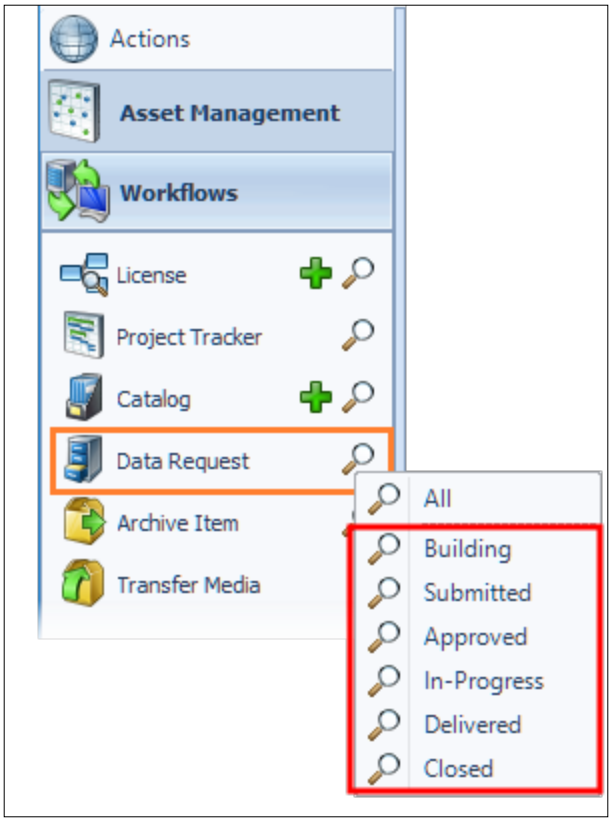
With a variety of features and customizable fields, you can easily modify the procedures you perform to best suit your company's workflow.

Typically, completing a request for data includes activities to be performed outside of Exploration Archives.The **Data Request** module provides the following statuses to manage the stages of your workflow:

- **Building**: Information is being entered and products are being added to the request.
- **Submitted**: Information is complete and the request has been submitted for approval.
- **Approved**: Information has been reviewed and the request has been approved.
- **In-progress**: The requested products are being compiled and are in transit for delivery.

- **Delivered**: The requested products have been delivered to the destination.
- **Closed**: Confirmation has been received that the products arrived at the destination.

The statuses are also configured as predefined searches. To locate a data request of a particular status, use the search function next to **Data Request** in the navigation panel under **Workflows**.



The search results will appear in the **Data Request Properties** grid.

The **Data Request** module in Exploration Archives Desktop is used for ordering products and tracking the movement of your data.

New in this version:

- Created a new summary screen such that a user can search for one or many Data Requests, and view all details without having to open an individual Data Request in Edit Mode.
- Added the ability to add staging files and media to a Data Request. This is helpful for cases were files or media may need to be sent to a third party prior to being uploaded to production.
- Added a **SEG-Y** Status column to the products grid.
- Added a **SEG-Y** Snapshot" menu option to products grid.

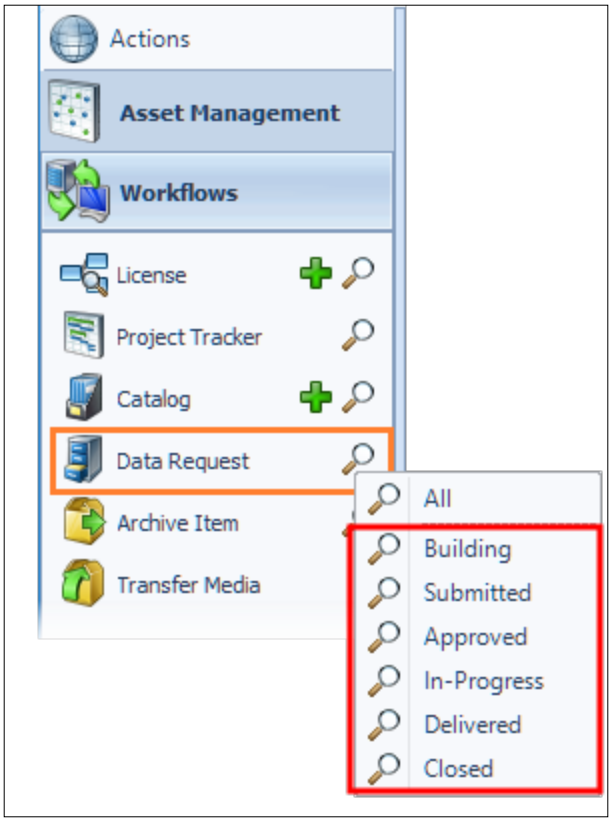
- Added multiple **Open selected** menu options to the products grid to allow opening of selected files and media in both production and staging.

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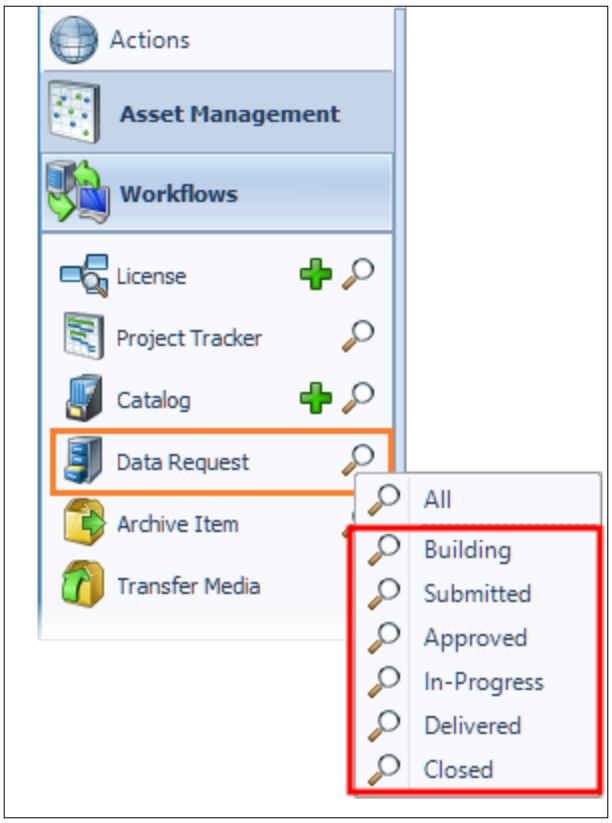


The search results will appear in the **Data Request Properties** grid.

The **Data Request** module in Exploration Archives Desktop is used for ordering products and tracking the movement of your data.

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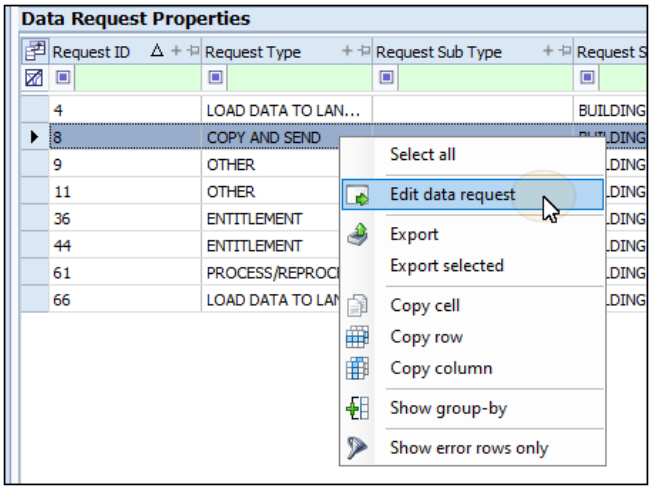
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Edit an existing Data Request

Data requests can be updated or edited during the process.

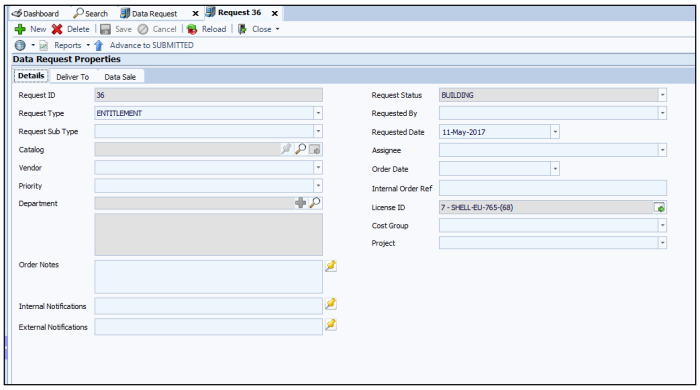
To edit a Data Request:

1. Open a Data Request by using either the following methods:
   - Highlight a Data request, then select **edit data request** from the context menu.



   - Highlight then double-click the data request to open it in a new tab.

   The Data request opens under a new tab.

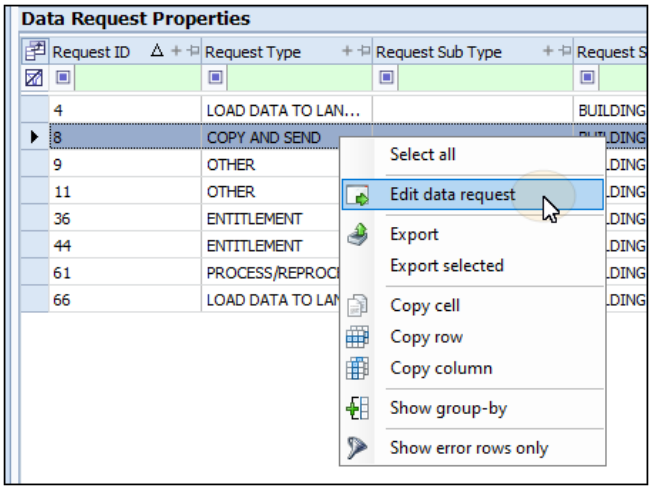


2. Make your edits to the relevant fields.
3. When finished, click **Save** on the toolbar.

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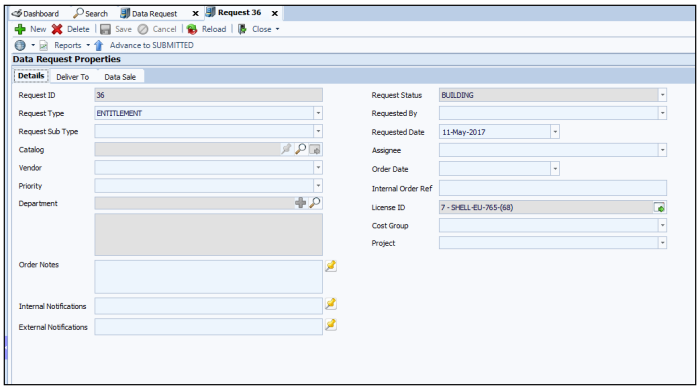
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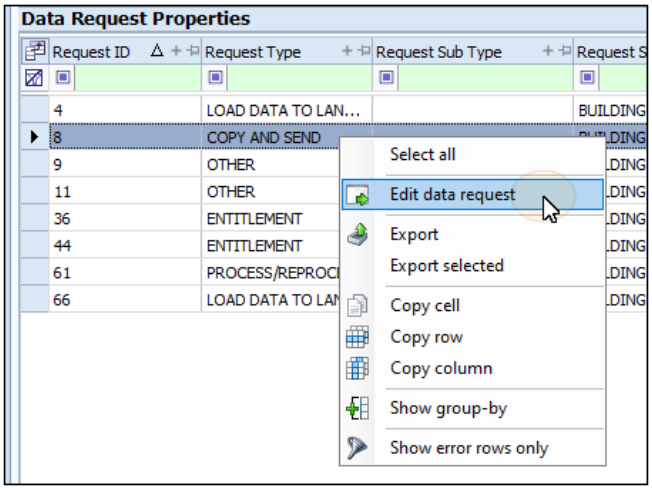


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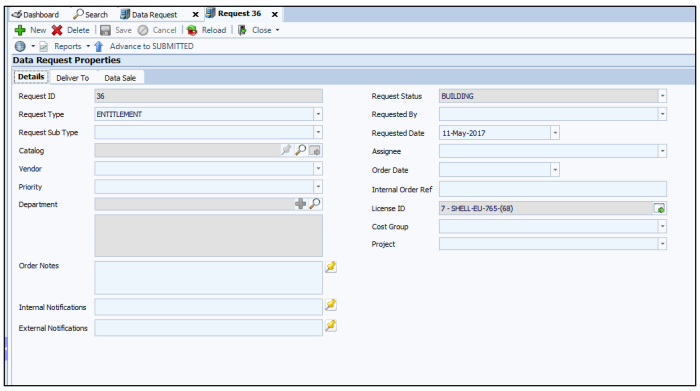
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Build a Data Request

To build a data request:

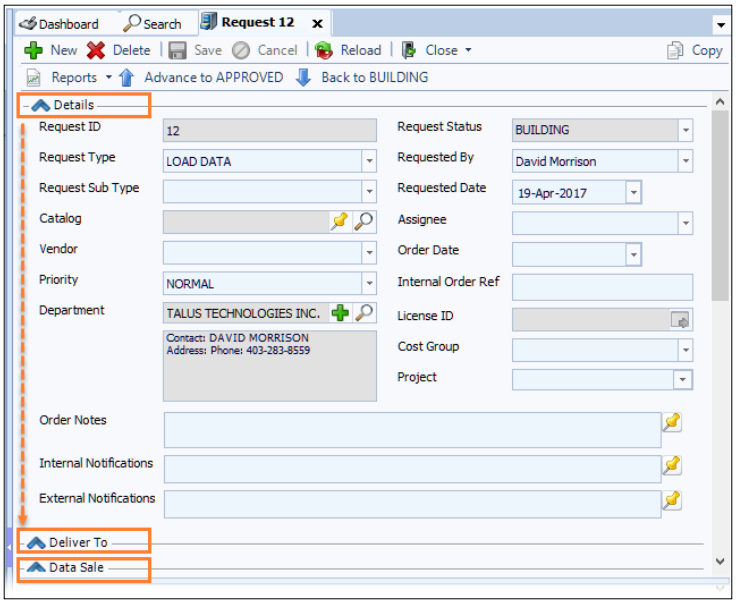
1. In the toolbar, select **New**. with an auto-generated **Request ID**.

If you have items for order in your **Cart**, you can create a new data request directly from the **Cart**.

A new data request starts in the *Building* status and is ready for you to enter information and add products.

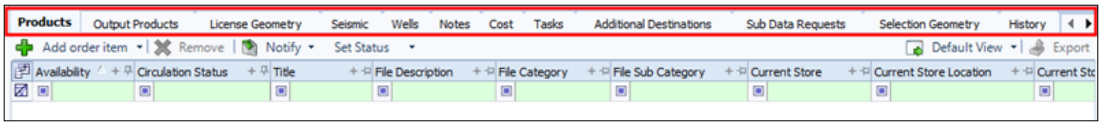
The main area of the workspace is divided into 3 sections for entering information:

Note:
Each section can be expanded or collapsed to save screen space.

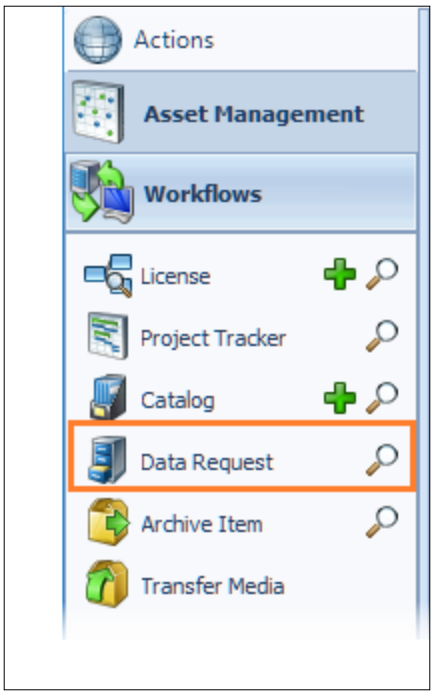


- **Details**: General details and logistics
- **Deliver To**: Delivery details including destination and checkout information
- **Data Sale**: Sales and licensing information

The lower panel of the workspace includes tabs for adding products, adding and viewing associated information, and accessing historical details.



To build a data request, open a new data request from the **Data Request** module. In the navigation panel, under **Workflows**, click **Data Request**.



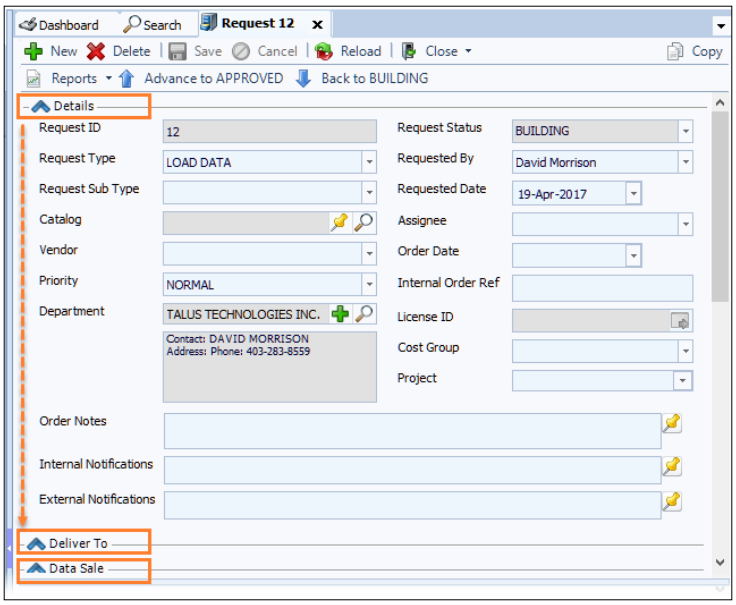
The **Data Request** module opens in the workspace with an auto-generated **Request ID**.

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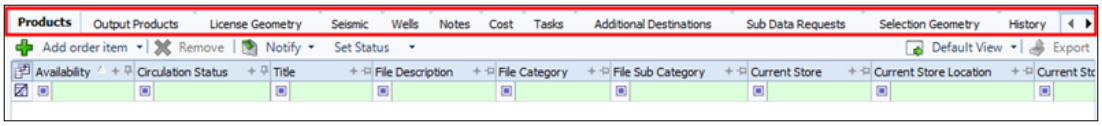
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Enter information

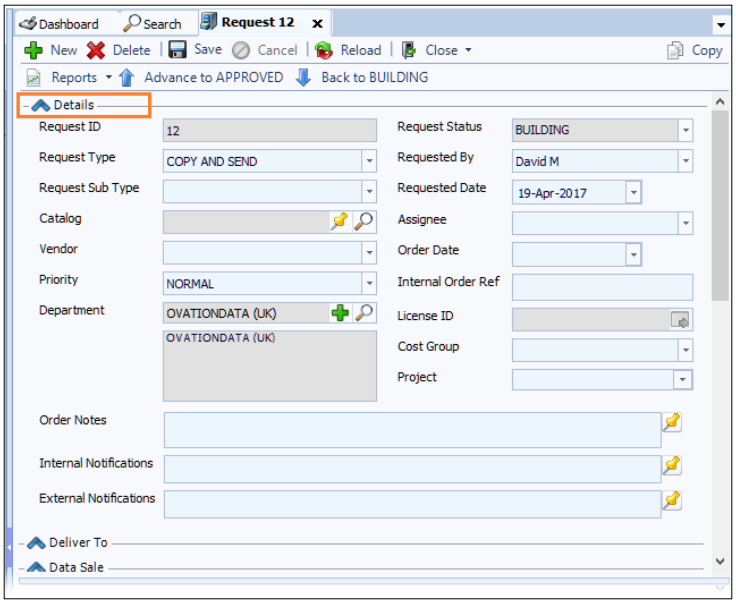
The information areas of a data request include:

- **Details**: General details and logistics of the data request
- **Deliver To**: Delivery details including destination and checkout information
- **Data Sale**: Sales and licensing information

Entering Details information

In the **Details** section of the **Data Request** module, enter the relevant information.

> **Note:**
> The **Request ID** and **Request Status** are auto-generated and **cannot** be edited.



Most of the fields require pre-defined detail that is available in the drop-down options for each field. Select each option as appropriate.

In the **Department** field, the drop-down opens a grid with your business associate library. Locate the department and click to select. The department name and contact information populate in the associated fields.

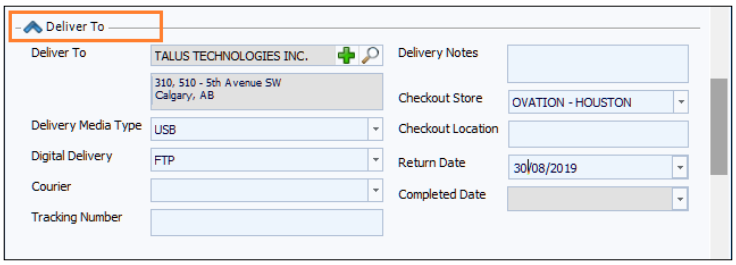
If your business contact is not available in the **Department** drop-down, you can add a new business associate. Click **add** and the **Business Associate** tab will open for you to enter the information.

Be sure to enter detail for the fields that are required by your company procedures.

When complete, click **Save**.

Entering Deliver To information

In the **Deliver To** section of the **Data Request** module, enter the relevant information and add notes if required.



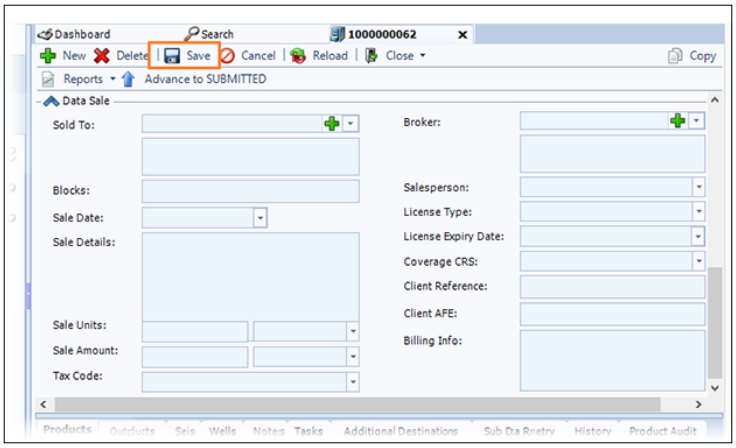
If your business contact is not available in the **Deliver To** drop-down, you can add a new business associate. Click **add** and the **Business Associate** tab will open for you to enter the information.

When complete, click **Save**.

Entering Data Sale information

The **Data Sale** section is available to use for a data request that is a sales transaction.

Enter the relevant information and click **Save**.



If your business contact is not available in the **Sold To** or the **Broker** dropdowns, you can add a new business associate. Click **add** and the **Business Associate** tab will open for you to enter the information.

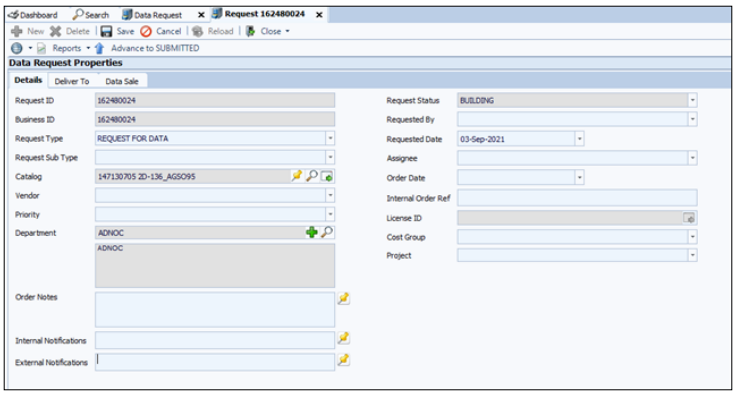
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- **Data Sale**: Sales and licensing information

Entering Details information

In the **Details** section of the **Data Request** module, enter the relevant information.

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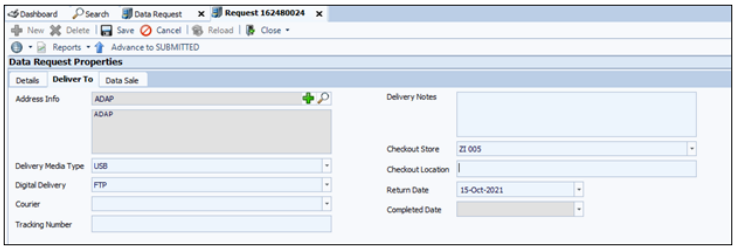
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When complete, click **Save**.

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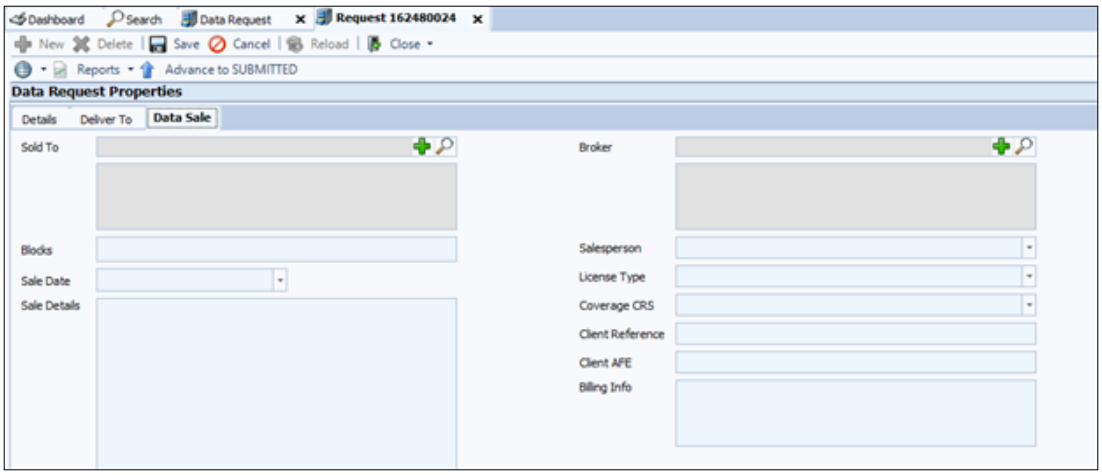
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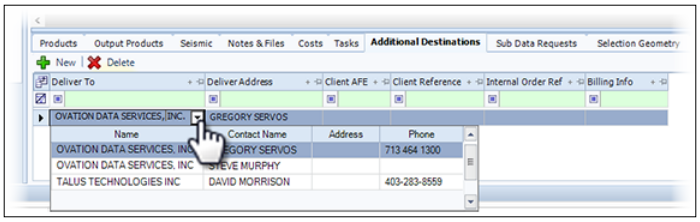
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Add additional destinations

The lower area of the workspace includes a tab for adding additional delivery destinations.

To add an additional destination:

1. Click the **Additional Destinations** tab.
2. Click **New**.
3. Click the down arrow in the **Deliver To** column to access the available destinations.

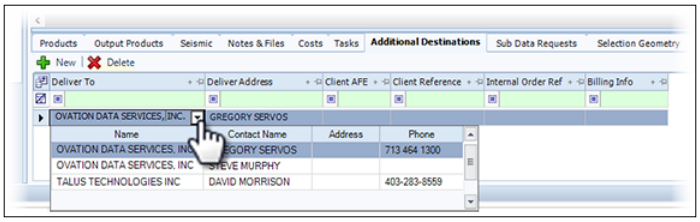


4. Select the target destination and the information adds to the grid.
5. Click **Save**.

The lower area of the workspace includes a tab for adding additional delivery destinations.

To add an additional destination:

1. Click the **Additional Destinations** tab.
2. Click **New**.
3. Click the down arrow in the **Deliver To** column to access the available destinations.



4. Select the target destination and the information adds to the grid.
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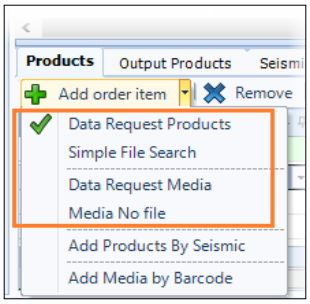
Adding products

The lower panel of the workspace contains tabs for adding products, adding and viewing associated information, and accessing historical details.

In the **Products** tab of the **Data Request**, you can add products using the **Add Order Item** feature. This feature offers a variety of options for adding a product to a **Data Request** that is displayed in the workspace.

To search for and add products:

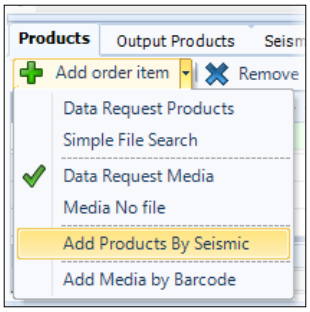
1. Click the down arrow of **Add Order Item** and select one of the configured search options.



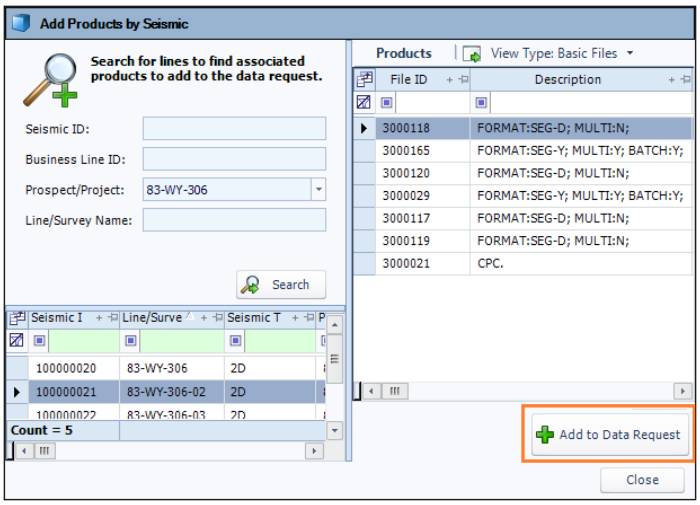
2. In the search results window, select the item to add to the **Data Request**. Hold Ctrl and click to select multiple items.
3. Click **OK**. The item(s) display in the **Products** tab grid.
4. Click **Save**.

To add products associated to a particular seismic:

1. Click the down arrow of **Add Order Item** and select **Add Products by Seismic**.

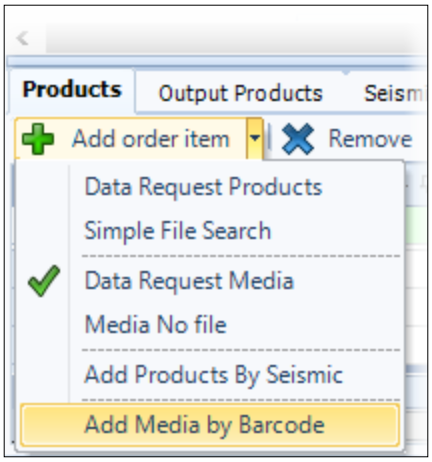


2. In the new window, enter or select search criteria and click **Search**.
3. Select an item in the search results in the lower left panel. The associated **Products** of the selected item will display in the right panel.
4. Select the products to add to the **Data Request** and click **Add to Data Request**.

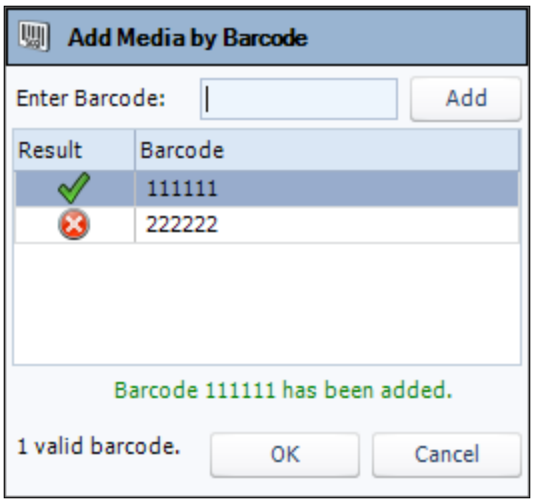


To add physical media items using barcode scanning:

1. Click the down arrow of **Add Order Item** and select **Add Media by Barcode**.



2. The **Add Media by Barcode** window opens. Use a scanner to scan the items to be added.
3. As items are scanned, valid barcodes are indicated with a green check. Invalid barcodes display a red x .



4. When complete, click **OK** to add the items to the **Products** tab grid.
   Invalid items will be omitted.

Using the Cart

The **Cart** is a temporary working space for you to collect items to add to a data request.

You can add seismic, files or media to the **Cart** from a search window or from the **Seismic**, **File** or **Media** modules.

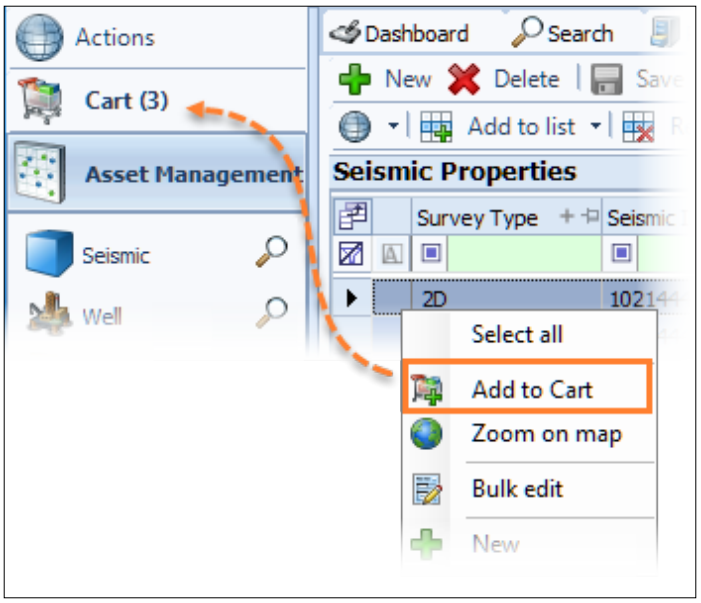
After adding items to your **Cart**, you can add them to an existing data request or use the collection to start a new data request.

The **Cart** appears at the top of the navigation panel and remains accessible while you navigate to different areas of the software.

Note:
If you add items from the **Related Records** of a module, the parent items of the selected record will add to the cart as well. However, when adding items from the main grid of a module, only the selected items from the main grid add to the cart.

To add items to the **Cart**:

1. Click to select items from a grid in the **Seismic**, **File** or **Media** module, or from a search results grid.
2. Right-click to open the context menu and select **Add to Cart**.



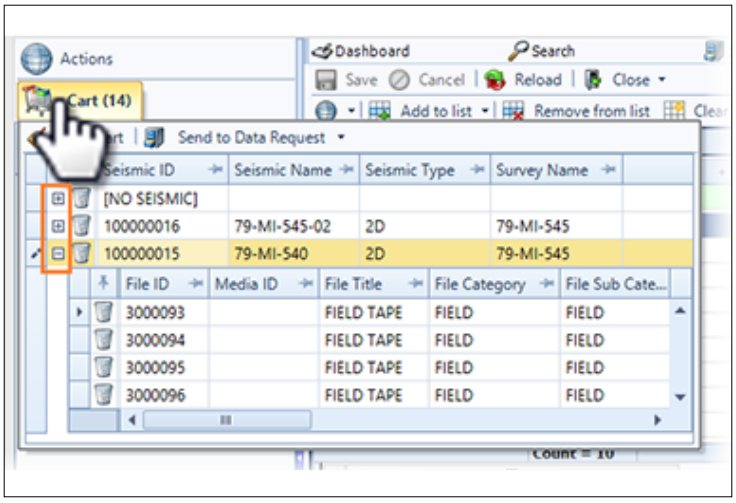
The items that are products will add to your cart.

Note:
The **Cart** doesn't appear until you add at least one item.

Reviewing items in the Cart

The **Cart** is a working space for you to collect items to add to a **Data Request**.

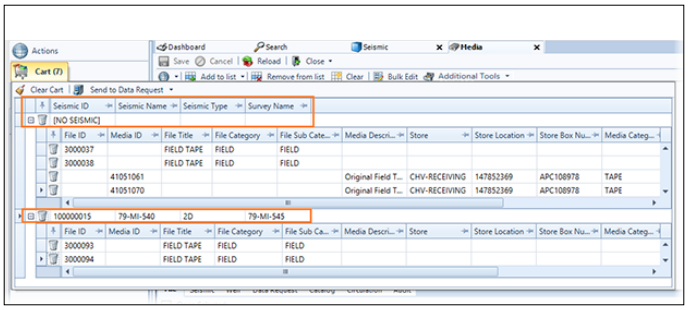
To review the items in your cart, click **Cart** at the top of the navigation panel.



The **Cart** window displays items in a grid that has expanding rows.

The initial view displays the seismic detail in the rows. If your **Cart** has files and media that is not linked to seismic, the initial row displays [NO SEISMIC].

- Click the expand button to display the file and media information for you to review.
- To remove individual items from your **Cart**, click trash in the row.
- To remove all items from your **Cart**, click **Clear Cart**

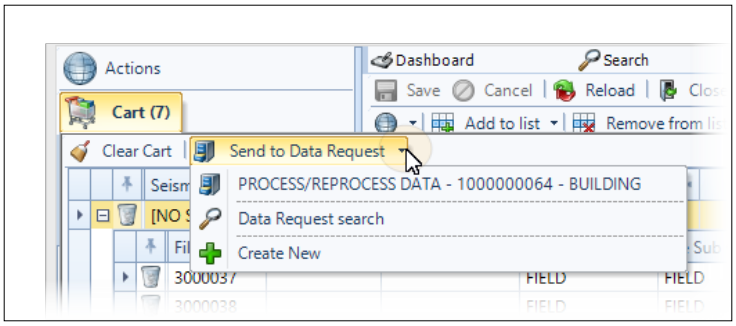


Transferring Cart items

The items in the Cart are available for adding to a data request.

To send, or transfer items to a data request, click the down arrow on the **Send to Data Request** button.

The items appearing in the menu include:



- Data requests that are currently open display as a list at the top of the menu.

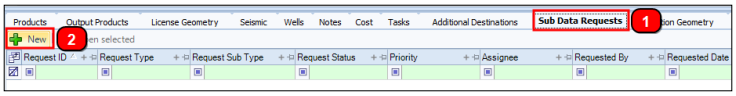
  Click on an Open Data Request to send items to a request that is currently open in the workspace.
- Click **Data Request search** to open a search to locate a data request and send the items to a specified request.
- Click **Create New** to create a new data request with the items in your **Cart**. Selecting **Create New** opens a new data request in the *Building* status.

After clicking to select the destination for your cart items, the items automatically transfer to the grid in the **Products** tab of the data request.

Creating a sub data request

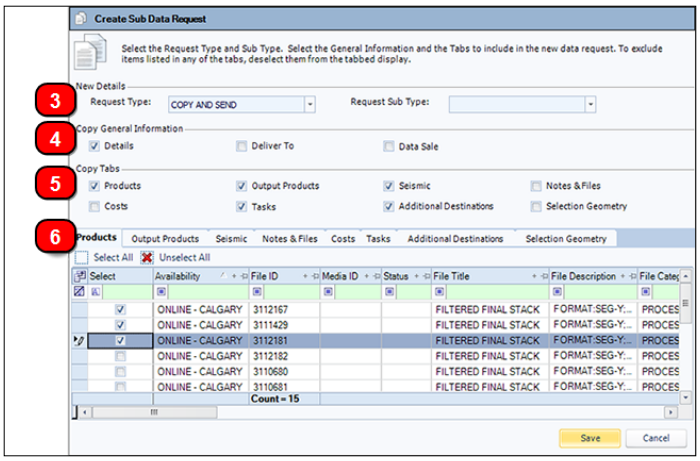
The **Sub Data Request** accommodates requests for data that you are distributing to multiple locations. The **Sub Data Request** populates the information from the main request, making it available for you to filter out the detail that is not applicable.

To create a **Sub Data Request**:

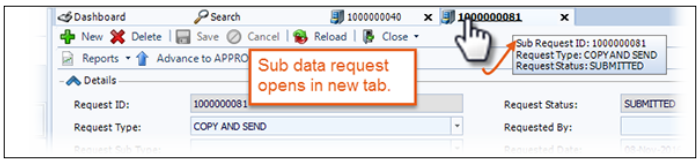


1. In the lower area of the workspace, click the **Sub Data Request** tab.
2. Click **New**.

   The **Create New Sub Data Request** window opens.



3. In the **New Details** section, select the **Request Type** and **Request Sub Type**.
4. In the **Copy General Information** section, select the areas from the main request to copy. The information will copy to your **Sub Data Request** and will be available to edit further if needed.
5. In the **Copy Tabs** section, select the checkbox next to the tab titles that you want to copy to your **Sub Data Request**. Selecting a tab includes all the detail from that tab.
6. Use the tabs displayed in the lower panel and the checkboxes in the **Select** column to specify the rows to copy. Alternatively, click **Unselect All** and select the particular items to include. Click through each tab and select or deselect the rows for your **Sub Data Request**.
7. Click **Save**. The selected information copies to the sub data request and opens in a new module tab. Point to the tab title and a pop-up opens with the sub request details.

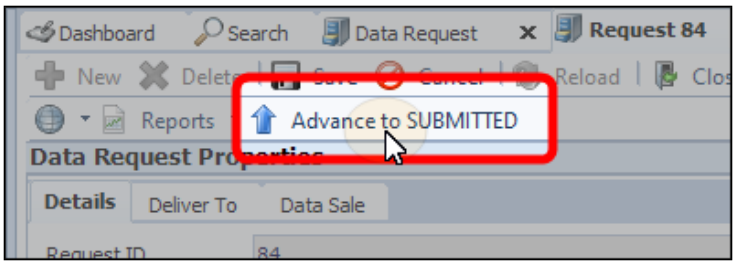


Submit a data request

Advancing a data request to *Submitted* status will make it available for the designated person to review and approve.

> **Warning:**
> Before advancing a data request to *Submitted* status, ensure that all the information is correct and that all the requested products have been added.

To advance your data request to *Submitted* status, click **Advance to SUBMITTED**.

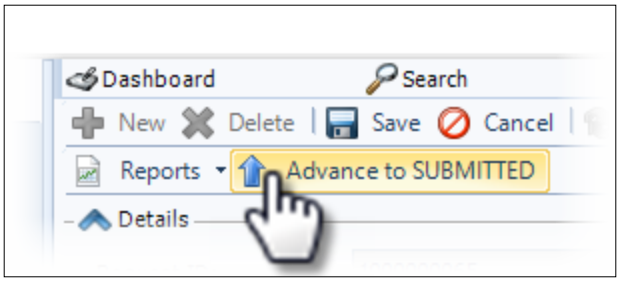


Note:
Orders submitted via Exploration Archives Browser automatically display with a *Submitted* status.

Advancing a data request to *Submitted* status will make it available for the designated person to review and approve.

Warning:
Before advancing a data request to *Submitted* status, ensure that all the information is correct and that all the requested products have been added.

To advance your data request to *Submitted* status, click **Advance to SUBMITTED**.



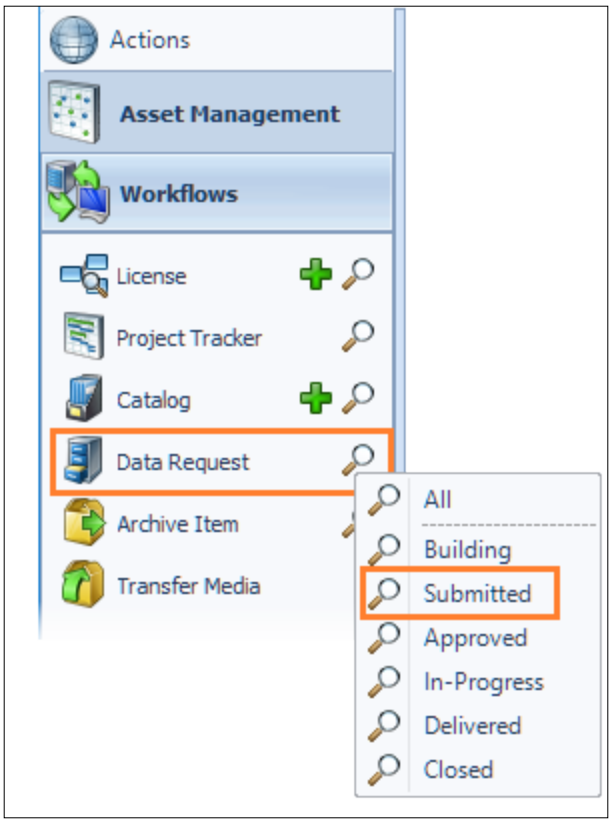
Note:
Orders submitted via Exploration Archives Browser automatically display with a *Submitted* status.

Approve a data request

Data requests in **Submitted** status are available to review for approval.

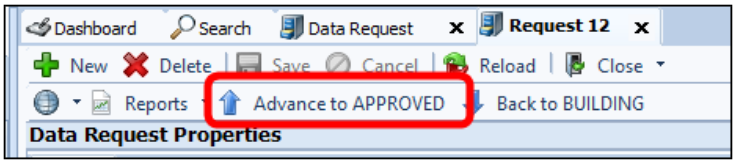
To locate a **Submitted** data request:

Click search next to **Data Request** and select **Submitted**.



The results open in the **Search** module. Double-click on a data request in the grid to open. The data request opens in the workspace.

Review the details of the order to ensure they are correct. If the request is accurate and acceptable, click **Advance to APPROVED**.

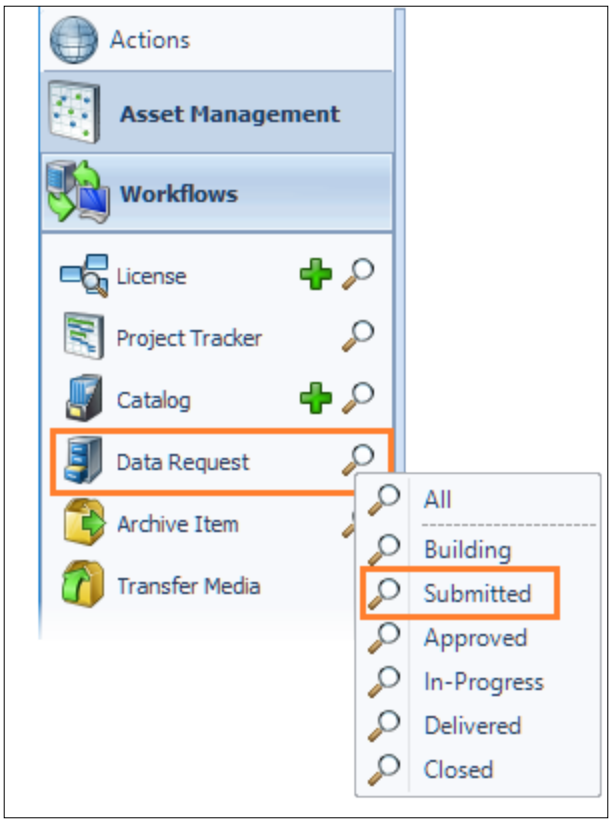


If the request is not acceptable, click **Back to BUILDING**.

Data requests in **Submitted** status are available to review for approval.

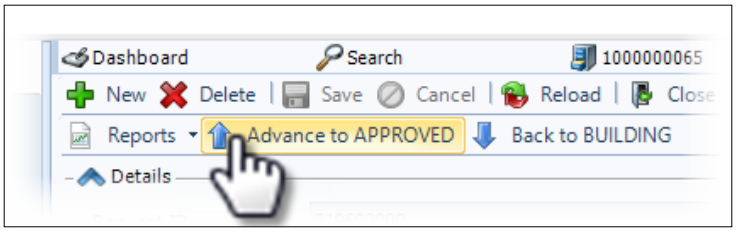
To locate a **Submitted** data request:

Click search next to **Data Request** and select **Submitted**.



The results open in the **Search** module. Double-click on a data request in the grid to open. The data request opens in the workspace.

Review the details of the order to ensure they are correct. If the request is accurate and acceptable, click **Advance to APPROVED**.

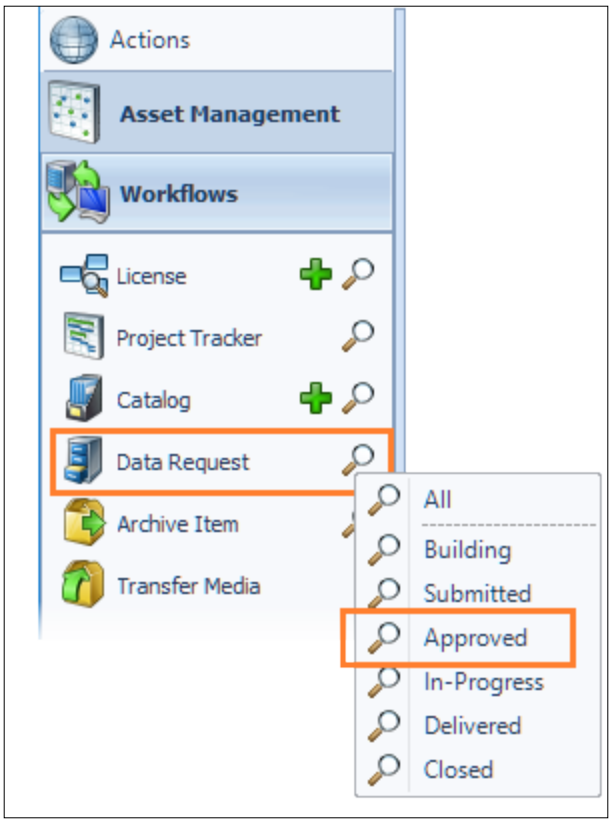


If the request is not acceptable, click **Back to BUILDING**.

Execute a Data Request

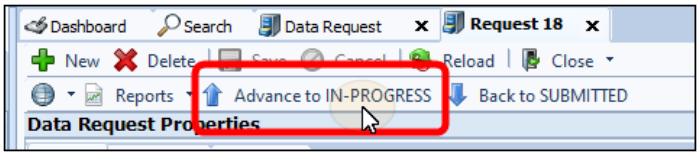
Data Requests in *Approved* status are ready for executing.

To locate an *Approved* data request, click search next to **Data Request** and select **Approved**.

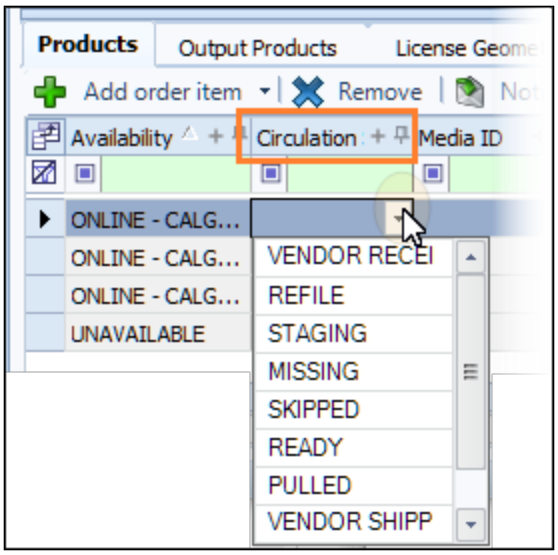


The results open in the **Search** module. Double-click on a data request in the grid to open. The data request opens in the workspace.

1. Click **Advance to IN-PROGRESS** and begin processing the order.

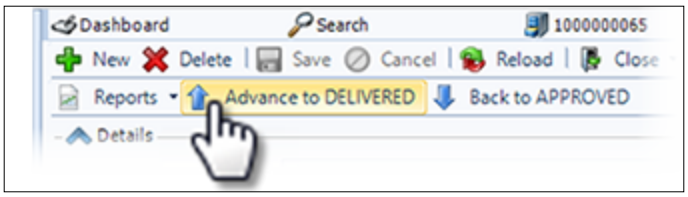


2. In the lower panel of the **Data Request** module, use the **Products** tab to track progress as you prepare the data. Use the **Circulation** column to update the location of items.



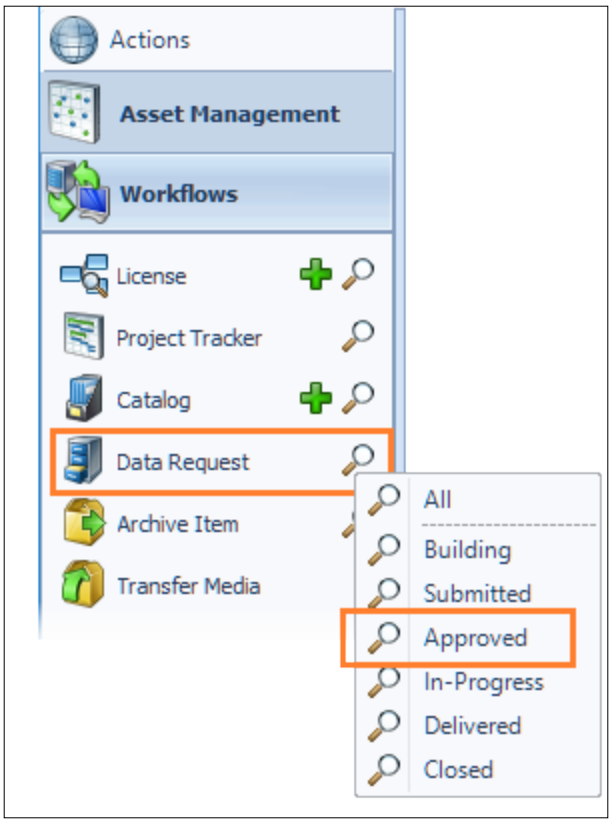
If your company workflow uses MobileMedia, these locations update automatically. For detail, refer to Using MobileMedia™.

3. When all items have been sent, advance the status of the data request to *Delivered* by clicking **Advance to Delivered**.



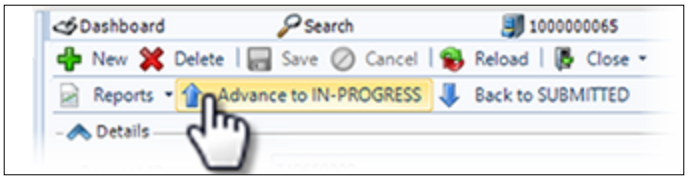
Data Requests in *Approved* status are ready for executing.

To locate an *Approved* data request, click search next to **Data Request** and select **Approved**.

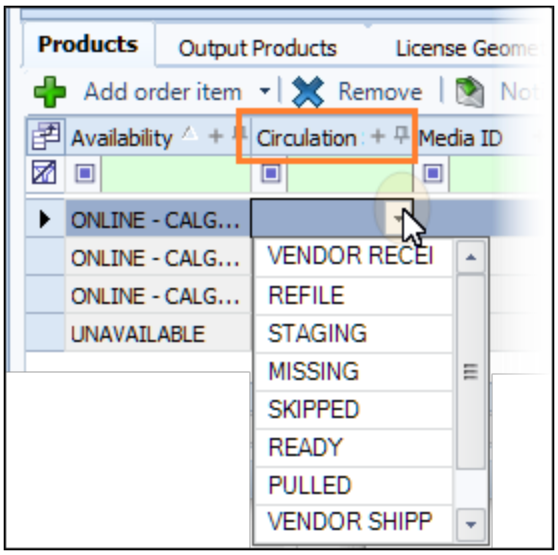


The results open in the **Search** module. Double-click on a data request in the grid to open. The data request opens in the workspace.

1. Click **Advance to IN-PROGRESS** and begin processing the order.

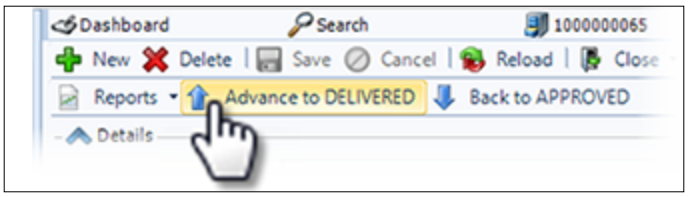


2. In the lower panel of the **Data Request** module, use the **Products** tab to track progress as you prepare the data. Use the **Circulation** column to update the location of items.



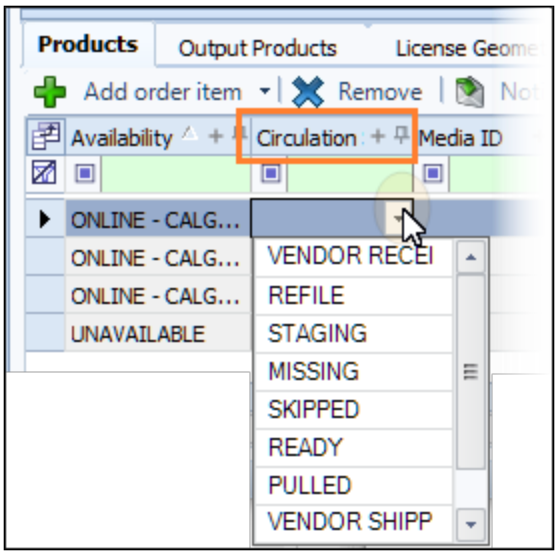
If your company workflow uses MobileMedia, these locations update automatically. For detail, refer to Using MobileMedia™.

3. When all items have been sent, advance the status of the data request to *Delivered* by clicking **Advance to Delivered**.

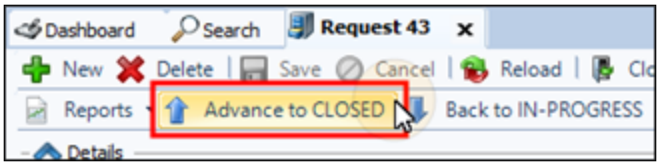


Monitoring delivery of data

The last step in a data request is to monitor the receipt and possible return of data. If the status of the data request is *Delivered*, the delivery progress will be tracked. The "Products" tab contains a "*Circulation*" column to monitor the delivery of products.



When all items have arrived at the expected destination, click **Advance to CLOSED** to change the status of the data request to *Closed*.



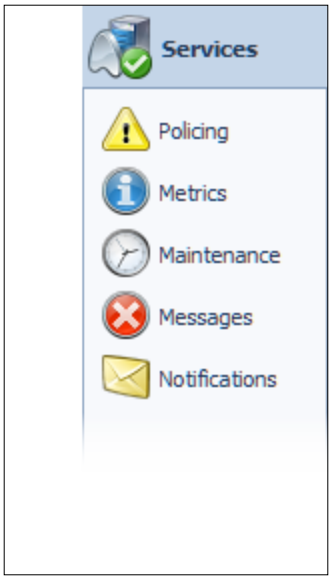
5.0 Services

Select Version of EA Desktop:

Exploration Archives Services is a server based notification and messaging system.

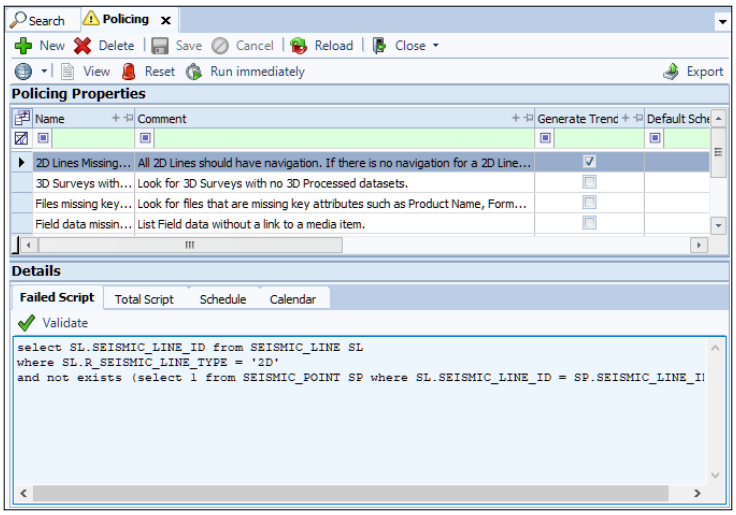
Your system administrator configures the Services tools according your data management procedures and monitoring requirements.

To open the Services configuration tools, click **Services** in the navigation panel and select the tool to open.



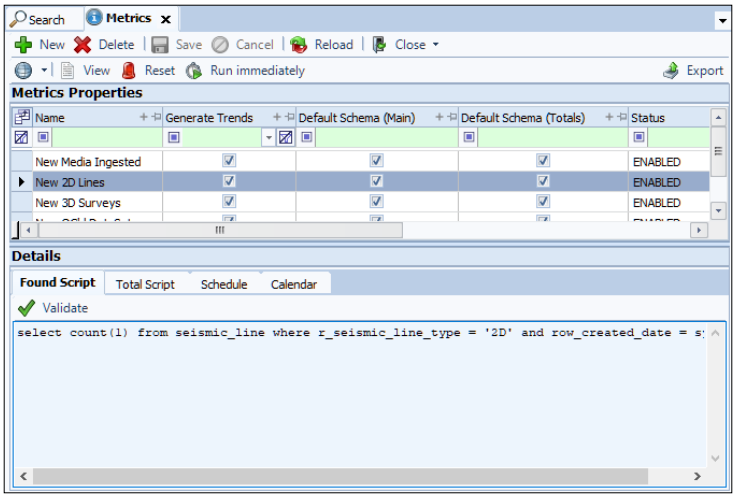
5.1 Policing

Policing scripts run nightly to monitor data integrity. Each morning, the system emails sends an email to designated users with a summary of any data that is violating rules. The summary provides users with information to help the address the issues and maintain consistent and clean data.



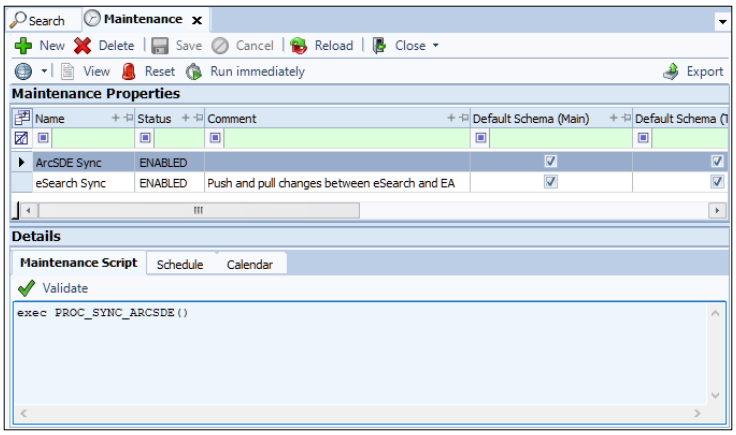
5.2 Metrics

The Metrics tool monitors various data trends. This is particularly useful for tracking cleanup of legacy data and overall asset acquisition.



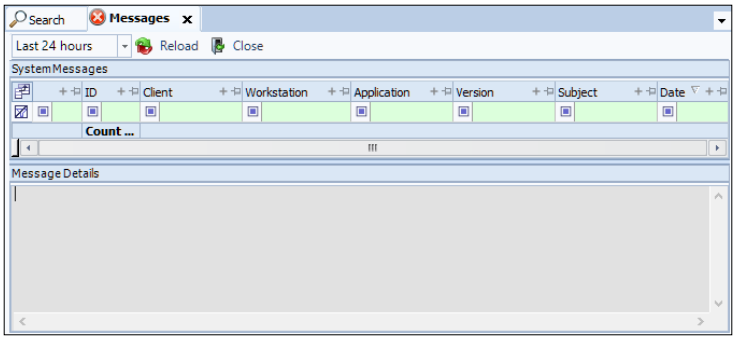
5.3 Maintenance

The Maintenance tool performs nightly database management tasks, such as refreshing materialized views. The Maintenance tool runs custom nightly scripts to perform tasks such as synchronizing data and populating data.



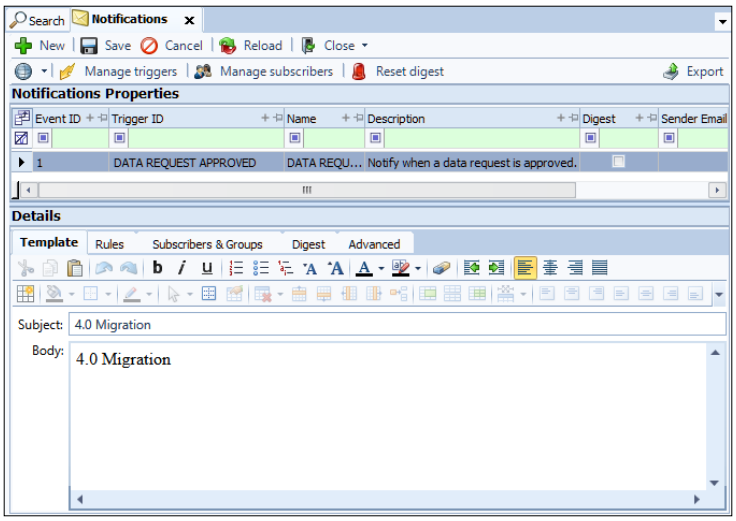
5.4 Messages

The Messages tool logs errors from across the application, and specifies the user who encountered the error. This log is useful for the Exploration Archives support team to address the errors quickly and effectively.



5.5 Notifications

The Notifications tool generates two types of notifications.



- **Instant notifications** monitor the database for particular actions, and triggers an email when that action occurs. For example, when a user completes a step within a task, the system sends an email to the user responsible for the subsequent step in the task.
- **Daily digest notifications** monitor particular actions over 24 hours. The system sends a summary email once per day. This is useful for tracking updates to particular data that needs to be monitored or reviewed.

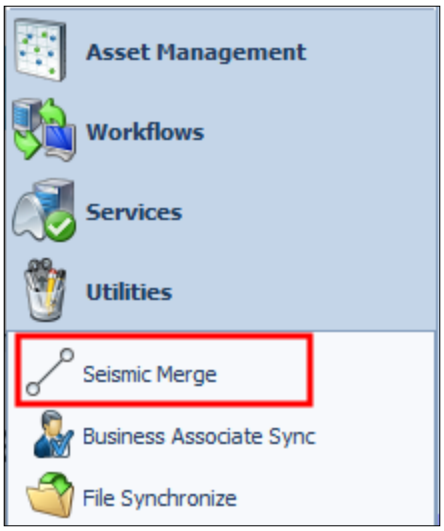
6.1 Seismic Merge

The Seismic Merge utility lets you take a number of seismic and merge them together to create a new record.

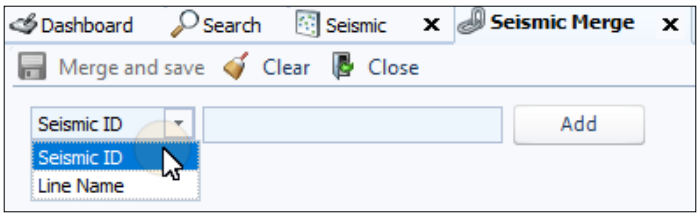
This is useful when cleaning up the database, and there are duplicate records with slightly different information added.

To merge Seismic records:

1. In the navigation panel, select **Utilities>Seismic Merge**



2. In the Seismic Merge tab, select the method to add Seismic records from the drop-down. You can add records by **Seismic ID** or **Line Name**.

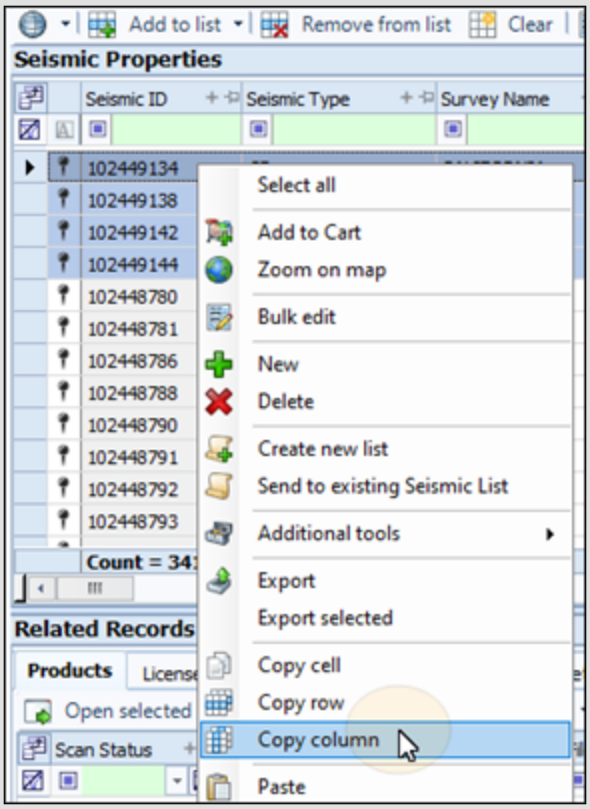


3. Enter the criteria that you choose for the Seismic records separated by a comma.

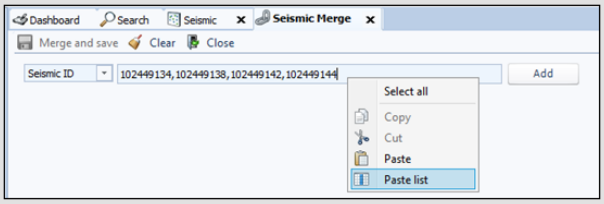
Tip:
There is a quick way to fill in the Seismic information in the records field:

1. Open the Seismic module and select the Seismic records to merge from the Seismic Properties grid.
2. Hover over either the Seismic ID or Line Name column, then right-click and select **Copy Column**

> **Note:**
> In our example, the values from the Seismic ID column will be copied from the selected records.



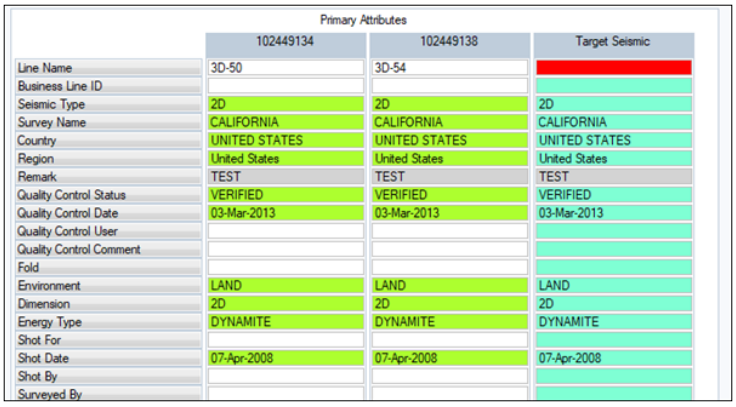
3. Click back onto the Seismic Merge tab, and click into the field.
4. Right-click and select **Paste List.**



5. The Seismic IDs or Line Names will be pasted into the field separated by commas.

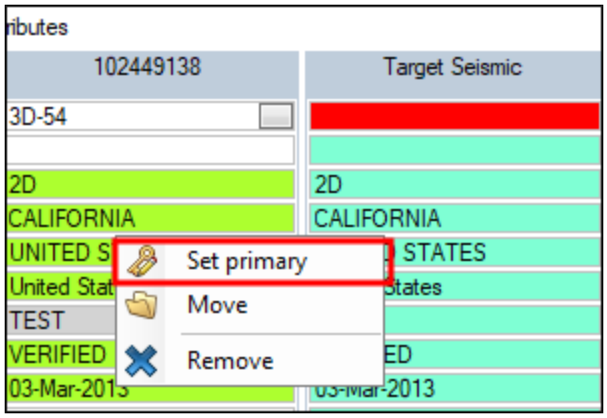
4. Click **Add**.

The Seismic records appear side by side in a column format, with an empty column representing the new record.



The rows that are green automatically carry over to the Target Seismic.

- Cells that are Highlighted in RED need values entered.
- Cells that can be edited will have an edit box appear in the right side. You can double-click the cell to enter text, or click the edit button.
- You can transfer the values from one of the Seismic records to the Target Seismic by double-clicking in a cell.That value will be added to the Target Seismic.
- You can also fill the values in from an entire Seismic Record by right-clicking in the Seismic Record and select **Set Primary**.



The values from that record will transfer over to the Target Seismic.

When finished, click **Merge and Save**. The Target Seismic will be assigned an ID when the merge is complete.

The Seismic Merge utility lets you take a number of seismic and merge them together to create a new record.

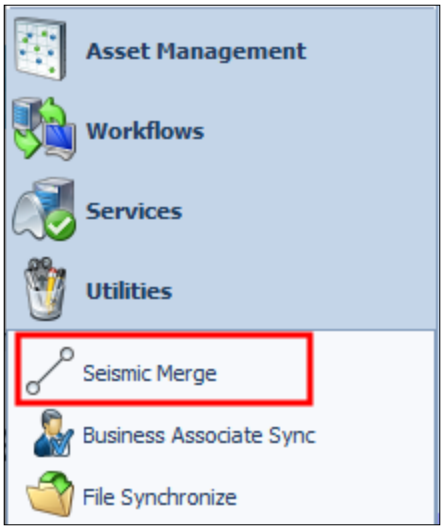
New in this version:

- **Line Name** is no longer required.
- Updated the “Seismic Merge utility” with the missing attributes from the Seismic table.

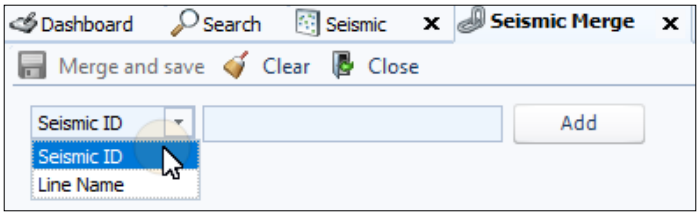
This is useful when cleaning up the database, and there are duplicate records with slightly different information added.

To merge Seismic records:

1. In the navigation panel, select **Utilities>Seismic Merge**



2. In the Seismic Merge tab, select the method to add Seismic records from the drop-down. You can add records by Seismic ID or Line Name.

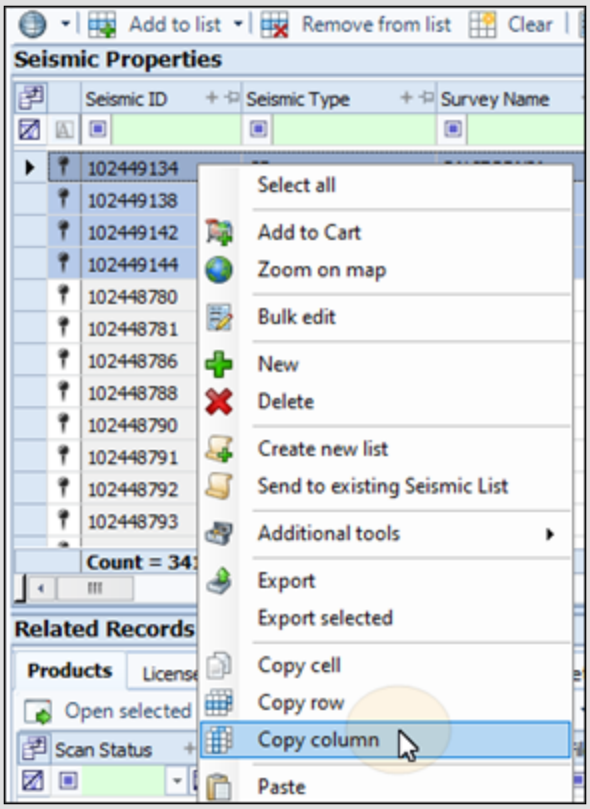


3. Enter the criteria that you choose for the Seismic records separated by a comma.

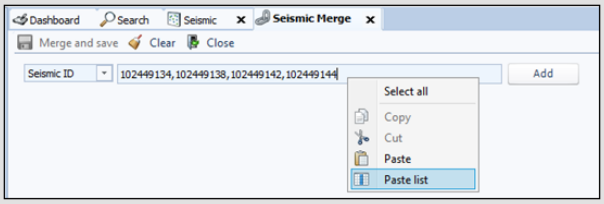
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2. Hover over either the Seismic ID or Line Name column, then right-click and select **Copy Column**

> **Note:**
> In our example, the values from the Seismic ID column will be copied from the selected records.



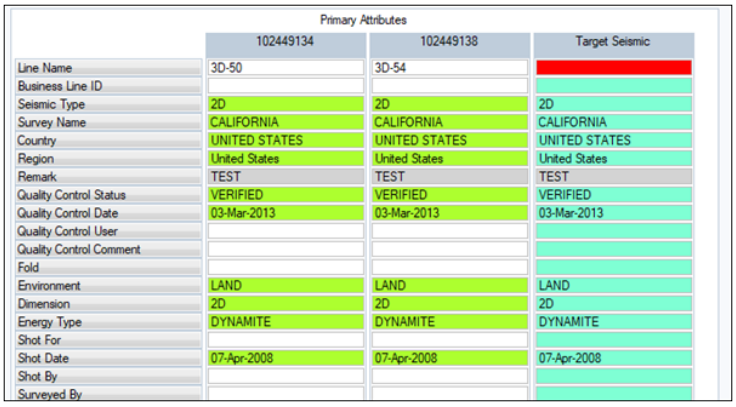
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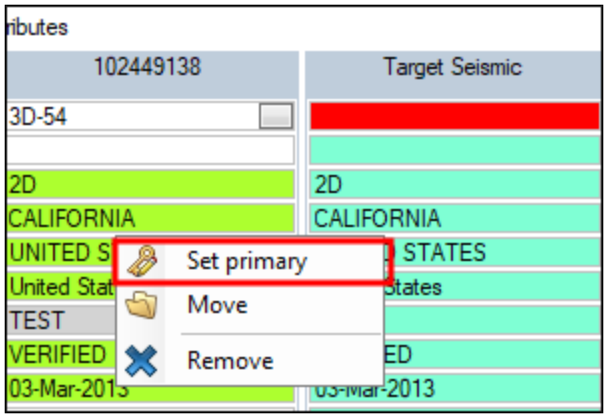
4. Click **Add**.

The Seismic records appear side by side in a column format, with an empty column representing the new record.



The rows that are green automatically carry over to the Target Seismic.

- Cells that are Highlighted in RED need values entered.
- Cells that can be edited will have an edit box appear in the right side. You can double-click the cell to enter text, or click the edit button.
- You can transfer the values from one of the Seismic records to the Target Seismic by double-clicking in a cell.That value will be added to the Target Seismic.
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The values from that record will transfer over to the Target Seismic.

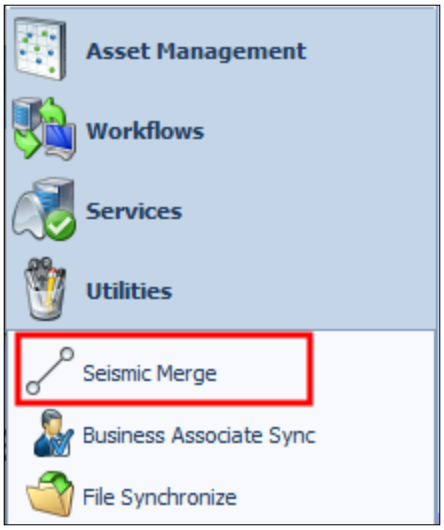
When finished, click **Merge and Save**. The Target Seismic will be assigned an ID when the merge is complete.

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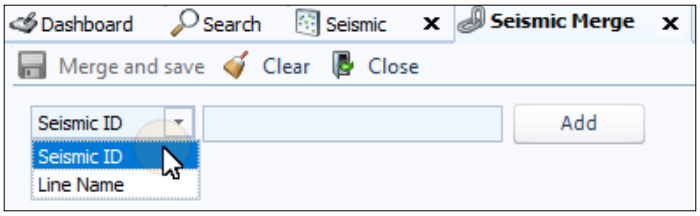
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1. In the navigation panel, select **Utilities>Seismic Merge**



2. In the Seismic Merge tab, select the method to add Seismic records from the drop-down. You can add records by Seismic ID or Line Name.

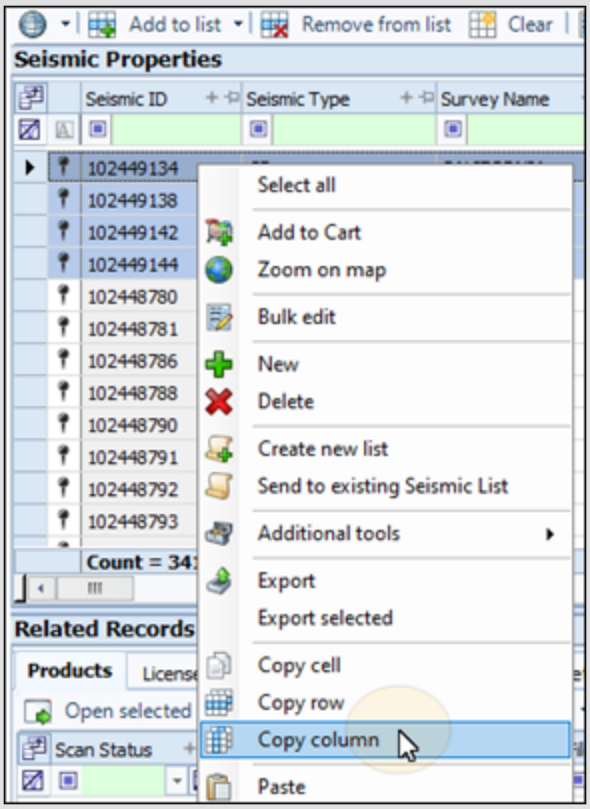


3. Enter the criteria that you choose for the Seismic records separated by a comma.

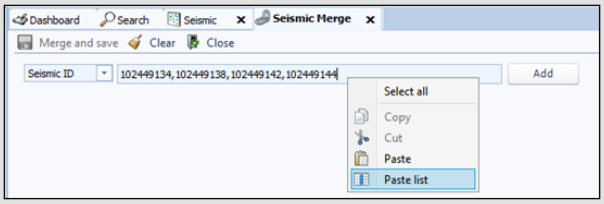
Tip:
There is a quick way to fill in the Seismic information in the records field:

1. Open the Seismic module and select the Seismic records to merge from the Seismic Properties grid.
2. Hover over either the Seismic ID or Line Name column, then right-click and select **Copy Column**

> **Note:**
> In our example, the values from the Seismic ID column will be copied from the selected records.



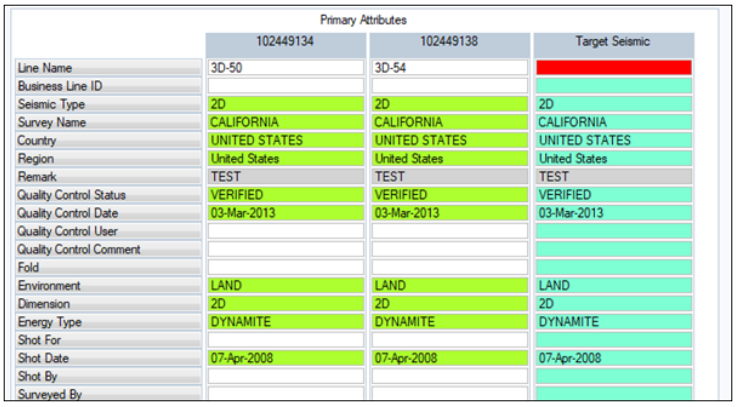
3. Click back onto the Seismic Merge tab, and click into the field.
4. Right-click and select **Paste List.**



5. The Seismic IDs or Line Names will be pasted into the field separated by commas.

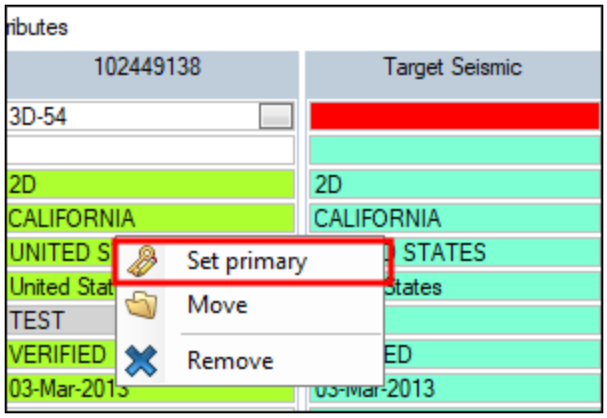
4. Click **Add**.

The Seismic records appear side by side in a column format, with an empty column representing the new record.



The rows that are green automatically carry over to the Target Seismic.

- Cells that are Highlighted in RED need values entered.
- Cells that can be edited will have an edit box appear in the right side. You can double-click the cell to enter text, or click the edit button.
- You can transfer the values from one of the Seismic records to the Target Seismic by double-clicking in a cell.That value will be added to the Target Seismic.
- You can also fill the values in from an entire Seismic Record by right-clicking in the Seismic Record and select **Set Primary**.



The values from that record will transfer over to the Target Seismic.

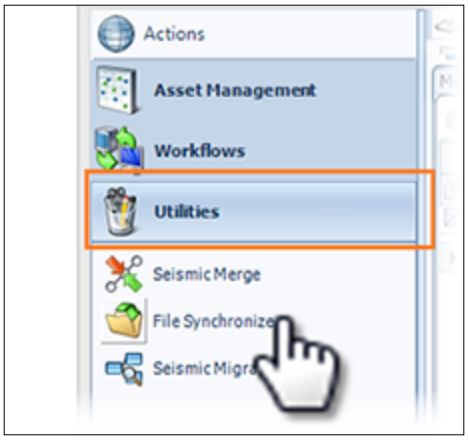
When finished, click **Merge and Save**. The Target Seismic will be assigned an ID when the merge is complete.

6.2 Synchronize files

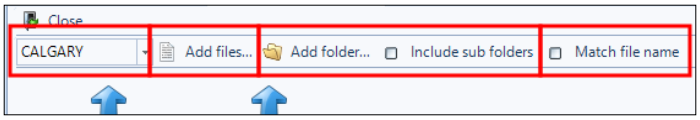
After moving files to a production folder, the new file location must be synchronized with Exploration Archives.

To synchronize (sync) the files:

1. In the navigation panel, under **Utilities**, click **File Synchronize**.
   The **File Synchronize** module opens in the workspace panel.



2. In the drop-down option, select the server that you want to add files or folders from. In the sample image, the server CALGARY is selected.



3. Add files:

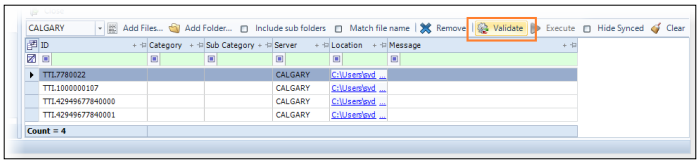
» To add individual files, click **Add Files**. Browse to the file location and select the files. Hold Ctrl to select multiple files.

» To add all files within a folder select **Add Folder**.

» To include the sub folders, select **Include sub folders** and then click **Add Folder**. Navigate to the folder and select to add. A grid populates in the workspace with the specified files listed.

» **Match file name** checks that the file names are the same.

4. Click **Validate** to verify that the specified files exist in the Exploration Archives production tables.



5. Check the **Message** column for errors and correct all errors before proceeding.

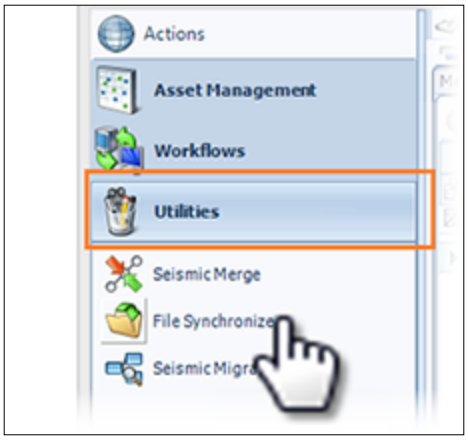
6. The **Execute** button becomes available when no errors exist. Click **Execute** to complete the process.

To filter the files remaining to be synced only, click the **Hide Synced** button.

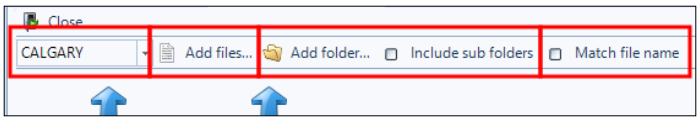
After moving files to a production folder, the new file location must be synchronized with Exploration Archives.

To synchronize (sync) the files:

1. In the navigation panel, under **Utilities**, click **File Synchronize**.
   The **File Synchronize** module opens in the workspace panel.



2. In the drop-down option, select the server that you want to add files or folders from. In the sample image, the server CALGARY is selected.



3. Add files:

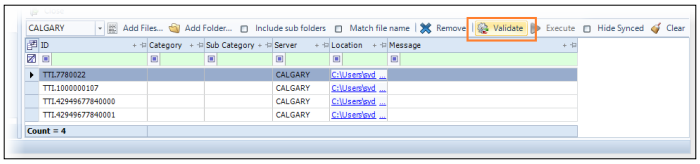
» To add individual files, click **Add Files**. Browse to the file location and select the files. Hold Ctrl to select multiple files.

» To add all files within a folder select **Add Folder**.

» To include the sub folders, select **Include sub folders** and then click **Add Folder**. Navigate to the folder and select to add. A grid populates in the workspace with the specified files listed.

» **Match file name** checks that the file names are the same.

4. Click **Validate** to verify that the specified files exist in the Exploration Archives production tables.



5. Check the **Message** column for errors and correct all errors before proceeding.
6. The **Execute** button becomes available when no errors exist. Click **Execute** to complete the process.

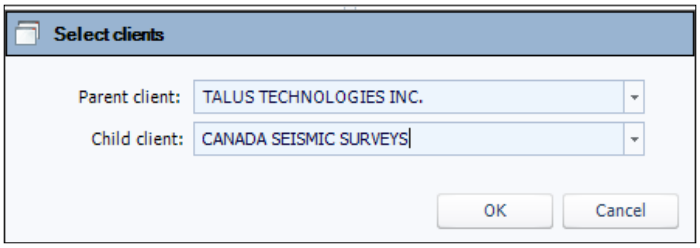
To filter the files remaining to be synced only, click the **Hide Synced** button.

6.3 License Compare

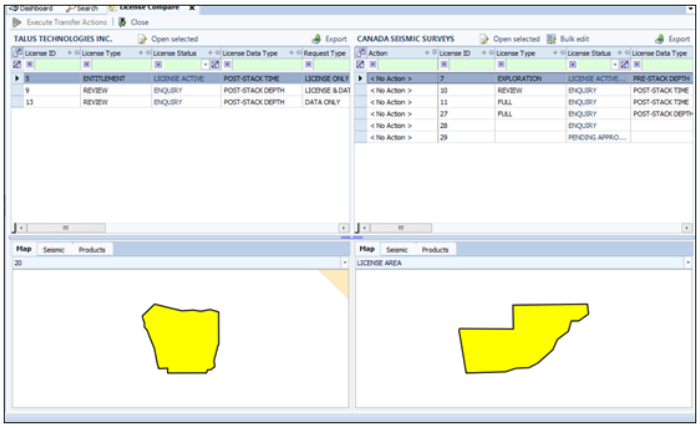
This utility is used to compare licenses from one company to another. it's used if a company buys another company to compare what licenses they have and give options to transfer/purchase the licenses that the old company owns.

To compare licenses between companies:

1. In the Navigation Panel select **Utilties>License Compare**.
2. In the **Select clients** dialog, select both the Parent and Child companies from the drop-down lists.



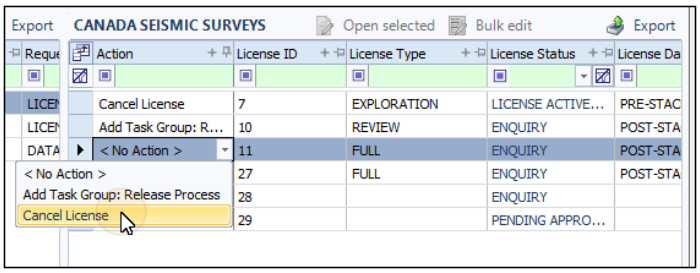
3. Click **OK**. The License Compare work area will open, divided into 2 panels.. one for the Parent Company, and one for the child.



The top half of the panel shows the licenses attached to the company. The lower half shows the related records broken into tabs for the selected license.

> **Note:**
> The lower panels are synced. When you select a tab in one panel, the other panel will change as well.

4. In the child tab select an action for a license in the Action column from the drop-down menu.

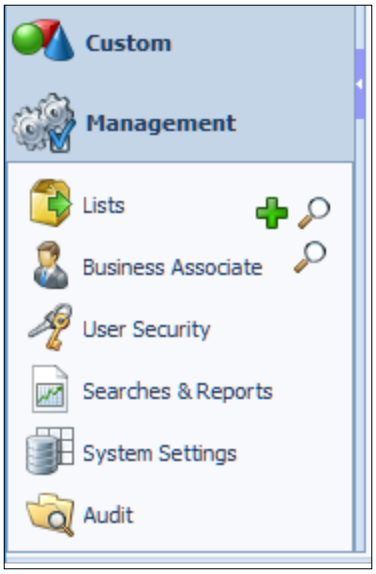


5. Once licenses have actions applied, click **Execute Transfer Actions**. This sends a set of tasks to a user to perform.

7.0 Management

> **Note:**
> Access to **Management** section requires the correct user security settings.

Managing the administration and configuration for different areas of Exploration Archives requires access to the modules in the **Management** area.



The **Management** modules include:

- **Lists**: Maintains a list of seismic, file or media items to use in a future workflow.
- **Business Associate**: Record and save client information for access from other modules.
- **User Security**: Set restrictions and permissions for the user and user groups.
- **Searches and Reports**: Create searches and reports, and specify the data to include in the results.
- **System Settings**: Configure all aspects of system settings. Set the values to display in designated data fields. Specify the data pairs to use for displaying data from the database in an Exploration Archives field. Customize the modules, enter the column headings, specify the fields to hide and display.
- **Audit**: Configure the audit grids.

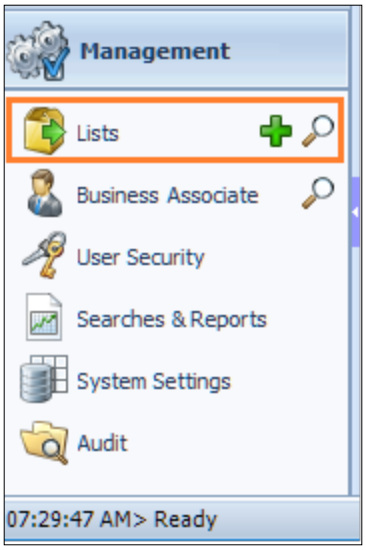
7.1 Lists

A **List** is a predefined group of records that can be recalled in other modules in. Seismic lists are the only ones integrated with the corresponding module. So from the seismic module you can search by list, add to list, create list but you can't do the same in file and media. Technically you can create a file or media list too

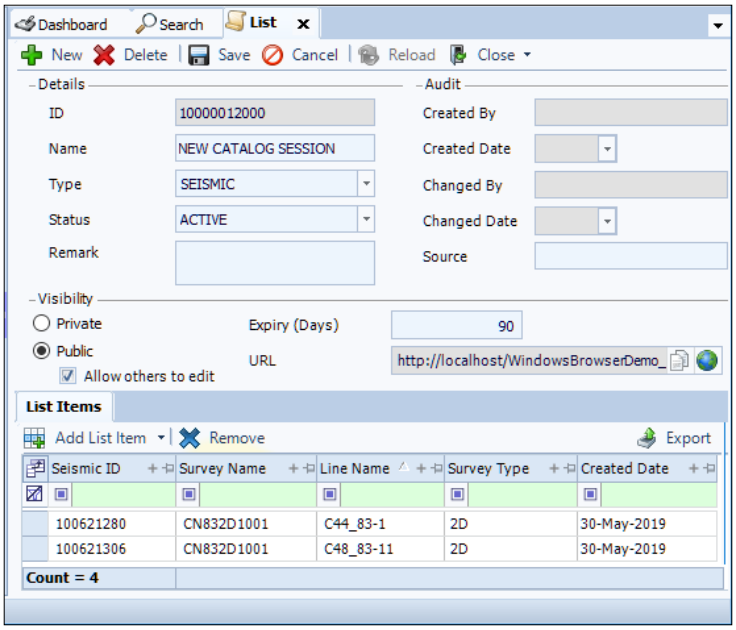
Create a new seismic list

To compile a group of seismic items that you can use in the future, create a new seismic list.

From the navigation panel expand the **Management** category. Click **New** next to **Lists**.



The **Lists** module opens for you to begin creating a list.



1. Select the **Type** of list.
2. Enter the detail for each field, including:

- **Name**: Enter a relevant name or number.
- **Remark**: Enter a description with useful information about the list.

3. In the **Visibility** section:
   - Set to **Public** and **Allow** others to edit.
   - For **Expiry (Days)**, enter the number of days to maintain the list. On expiry, the list will delete. To prevent deletion, set the **Expiry** to zero.
4. In the lower panel, click **Add List Item** to search for items to add. To select a particular search type, click the down arrow next to **Add List Item** and click a search. The search window opens.
5. Enter your search criteria and click **Search**. The window closes and the selected items display in the **List Items** grid.
6. When complete, click **Save** then **Close**.

Note:
After creating a Seismic List, you can access the list from the **Seismic** module, **Catalog** module and Exploration Archives Browser. Accessing other list types outside of the **Lists** module is not currently available.

Create a reserve list from Seismic

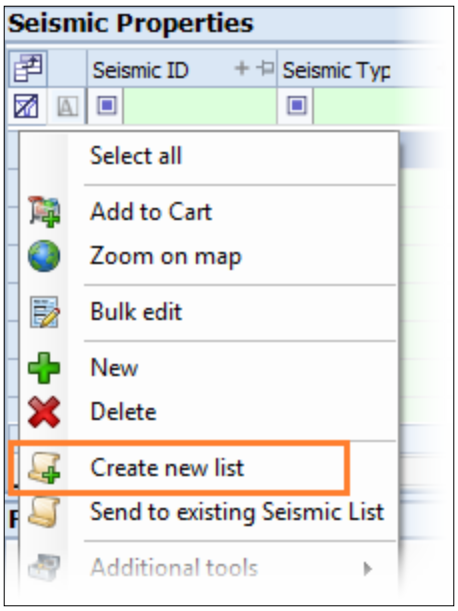
The **Lists** tool is for compiling a list of seismic, file or media items that will be part of a future workflow. The items you organize into a reserve list are stored and become accessible from the **Lists**, **Seismic** and **Catalog** modules.

In the **Lists** module, you can create a new list of items or access an existing list to continue adding or removing items as needed.

After searching in the **Seismic** module, you can send items from the seismic grid to a new or existing list.

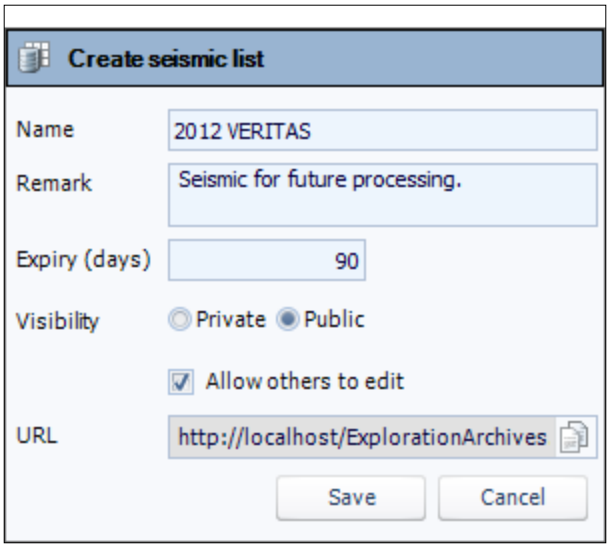
To add items to a new list...

1. Select the target items in the seismic grid and right-click to open the context menu. Click **Create new list**.



The **Create seismic list** window opens.

2. In the **Create seismic list** window, enter the detail for each field:



- **Name**: Enter a relevant name or number.
- **Remark**: Enter a description with useful information about the list.
- **Expiry**: Enter the number of days to maintain the record as a list. On expiry, the list will delete.

  Note:
  If you don't want the list to delete, set the **Expiry** to zero.

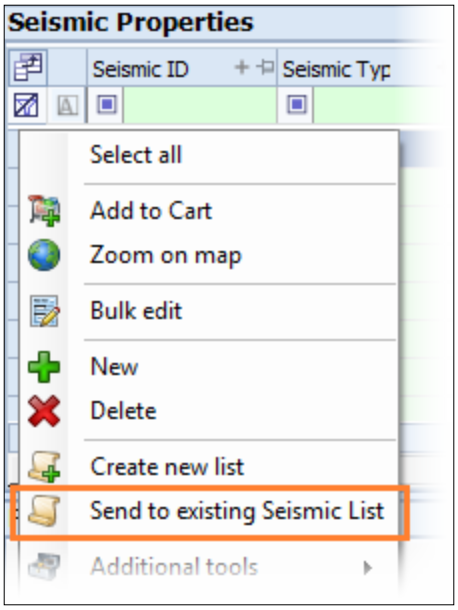
- **Visibility**: set to **Public** and **Allow** others to edit.

- **URL**: This field is displays the URL to access the seismic list in EA Browse. Click the **Copy** icon to copy the URL to your clipboard.

3. To save the list and close the window, click **Save**.

To add records to an existing list...

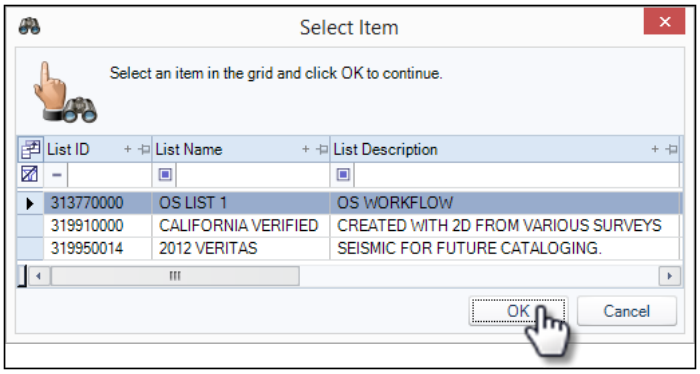
1. Select the target records in the seismic grid and right-click to open the context menu.
2. Click **Send to existing Seismic List**. The search window opens.



To find the list, enter search criteria and click **Search**.

> **Note:** To populate all lists, leave the search criteria blank and click **Search**.

3. The search results will populate in the **Select Item** window.



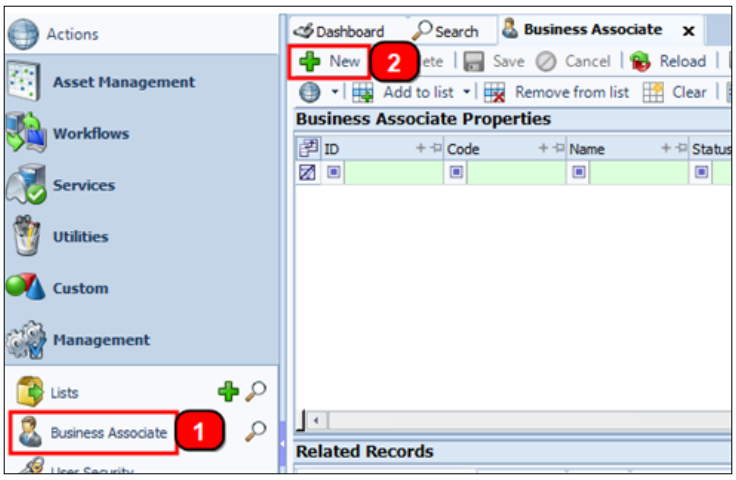
4. Select the target list then click **OK**. The records will be added to the selected list and the window will close.

7.2 Business Associate

The Business Associate module is where you can define a list of organizations you do business with. They can be associated to various records throughout Exploration Archives - seismic, wells, projects, data requests, licenses, etc.

New in this version: Added a vendor flag.

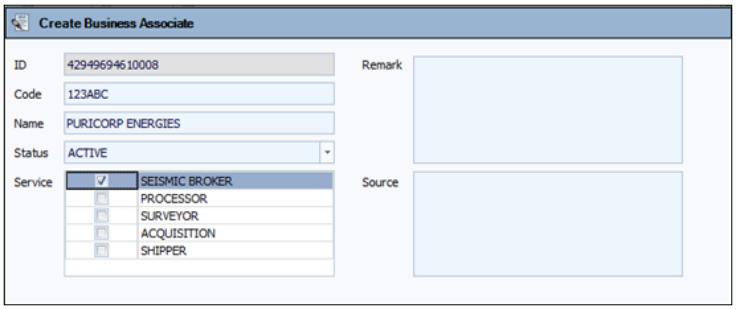
To add a new Business Associate:



1. In the Navigation panel, expand the Management section, then click **Business Associate**. a new tab will open in the workspace.
2. Click **New**

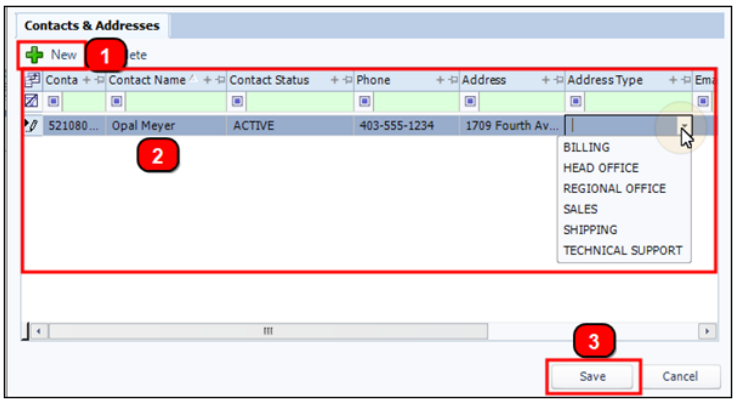
The **Create Business Associate** panel that opens is split into 2 sections:

The top section is where you enter information about the **Organization**:



Note:
The ID field is auto-generated. The Code and Name fields are required.

Once you have defined the company information, you can add **contacts** associated with the Organization:



1. In the **Contacts and Addresses** tab, click **New**.
2. A new row appears in the grid. The **Contact ID** will be auto-generated.

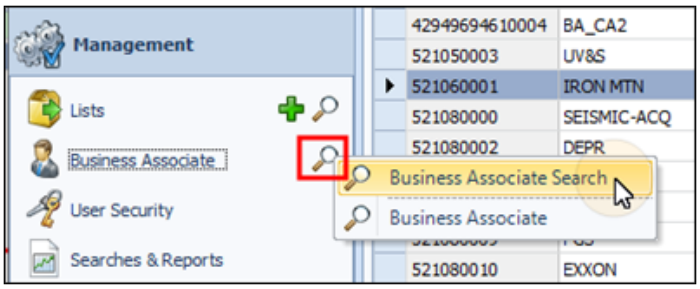
   Enter information for each column in the row by either:

   - Double-clicking in a cell and typing information in.
   - Using a drop-down list and selecting a value.

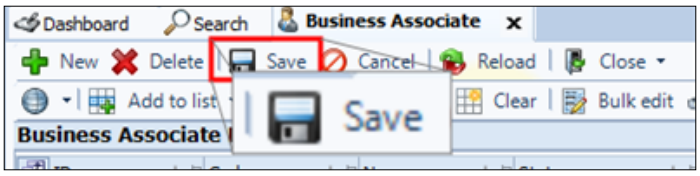
   Repeat steps 1 & 2 to add any additional contacts.
3. Once you have finished entering Company and Contact information click **Save**.

To edit an EXISTING Business Associate:

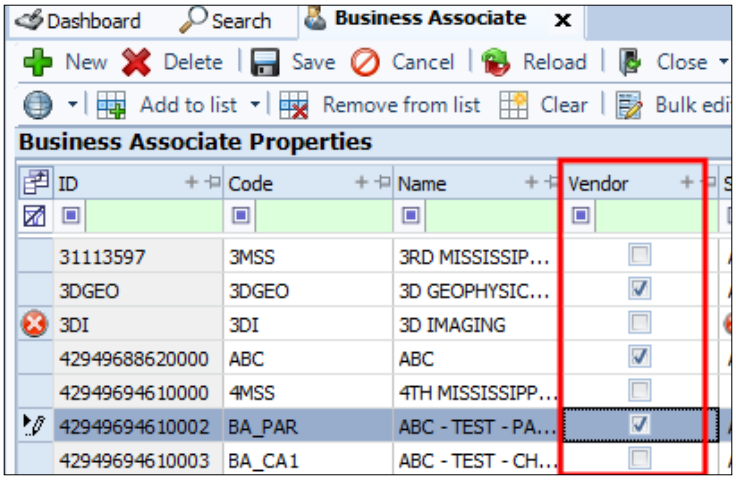
1. Find existing Business Associates by selecting the search icon beside the Business Associate option in the navigation panel.



2. Apply your search filter using one of the searches from the menu. The results will open in the **Business Associate** tab.
3. Select the Business Associate you want to edit.
4. The **Contacts and Addresses** tab will populate with existing contacts for the Organization
5. Edit information for each column in the row by either:
   - Double-clicking in a cell and typing information in.
   - Using a drop-down list and selecting a value.
6. When you have made all the changes, click **Save** on the toolbar.

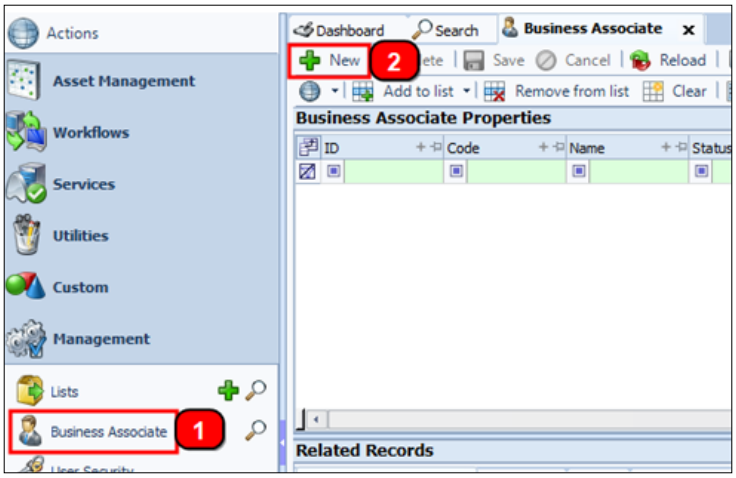


Once you have the Business Associate in the grid, you can set them as a Vendor by setting the check box located in the **Vendor** column.



The Business Associate module is where you can define a list of organizations you do business with. They can be associated to various records throughout Exploration Archives - seismic, wells, projects, data requests, licenses, etc.

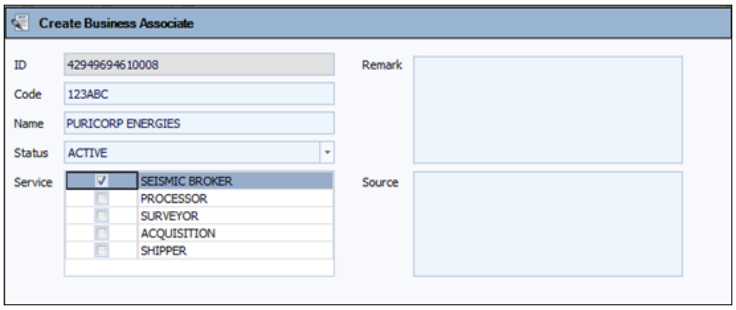
To add a new Business Associate:



1. In the Navigation panel, expand the Management section, then click **Business Associate**. a new tab will open in the workspace.
2. Click **New**

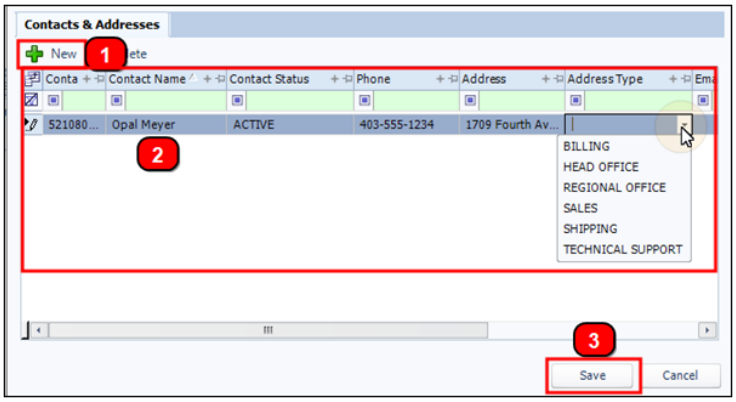
The **Create Business Associate** panel that opens is split into 2 sections:

The top section is where you enter information about the **Organization**:



Note:
The ID field is auto-generated. The Code and Name fields are required.

Once you have defined the company information, you can add **contacts** associated with the Organization:



1. In the **Contacts and Addresses** tab, click **New**.
2. A new row appears in the grid. The **Contact ID** will be auto-generated.

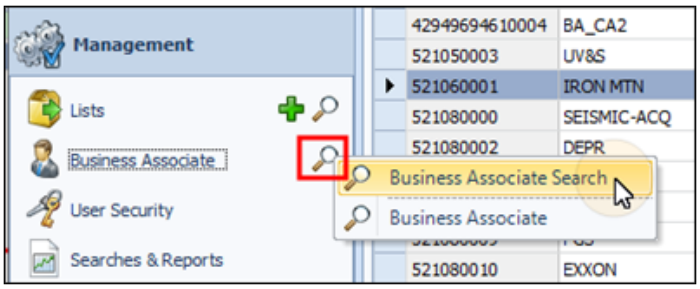
   Enter information for each column in the row by either:

   - Double-clicking in a cell and typing information in.
   - Using a drop-down list and selecting a value.

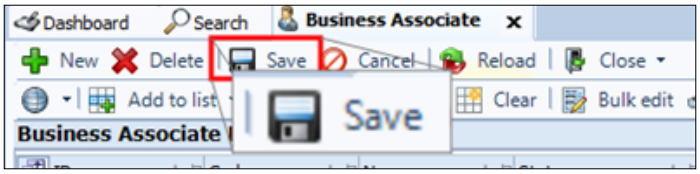
   Repeat steps 1 & 2 to add any additional contacts.
3. Once you have finished entering Company and Contact information click **Save**.

To edit an EXISTING Business Associate:

1. Find existing Business Associates by selecting the search icon beside the Business Associate option in the navigation panel.



2. Apply your search filter using one of the searches from the menu. The results will open in the **Business Associate** tab.
3. Select the Business Associate you want to edit.
4. The **Contacts and Addresses** tab will populate with existing contacts for the Organization
5. Edit information for each column in the row by either:
   - Double-clicking in a cell and typing information in.
   - Using a drop-down list and selecting a value.
6. When you have made all the changes, click **Save** on the toolbar.



7.3 User Security

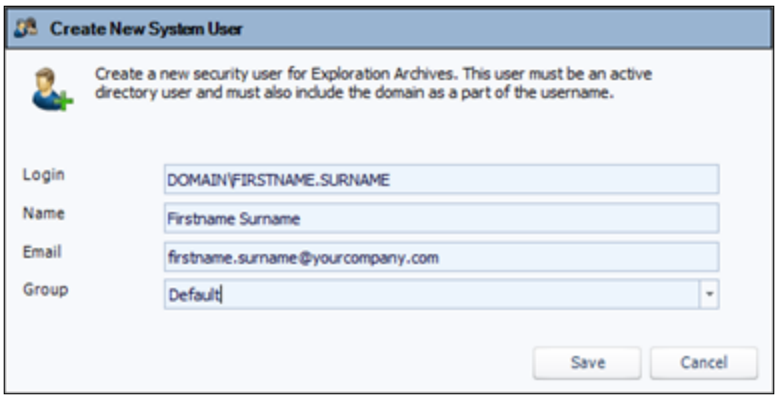
> **Note:**
> Creating a new user profile for Exploration Archives requires administrative access.

To create a new user:

1. In the navigation panel of Exploration Archives, open the **Management** category and click **User Security**. The **User Security** module opens in the workspace.
2. In the main toolbar, click **New User**. The **Create New System User** window opens.

Exploration Archives can use two forms of authentication, depending on your setup.

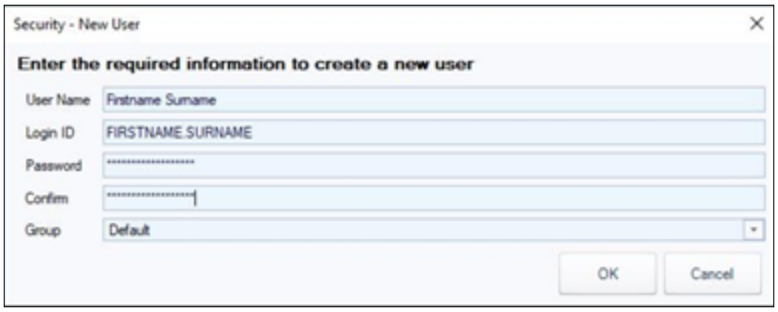
Microsoft® Windows® authentication



1. In the **Login** field, enter the Microsoft® Windows® user authentication credentials.
2. In the **Name** field, enter the user's name
3. In the **Email** field, enter the user's full email address.
4. The **Group** field determines the **Dashboard** widgets that will display for the user.

Note:
If you are using SQL, the group must have access to SQL.

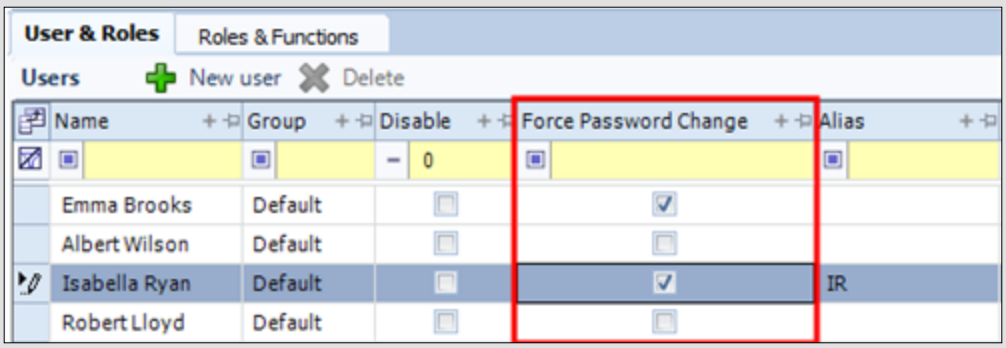
Server authentication



1. In the **User Name** field, enter the name of the user.
2. In the **Login ID** field, enter the user's first name and surname (separated by a space):
3. In the **Password** field, enter a password for the first login. **Confirm** the password in the next field.
4. The **Group** field determines the **Dashboard** widgets that will display for the user.

Click **Save** and a new row adds to the **Users** grid with the new user information.

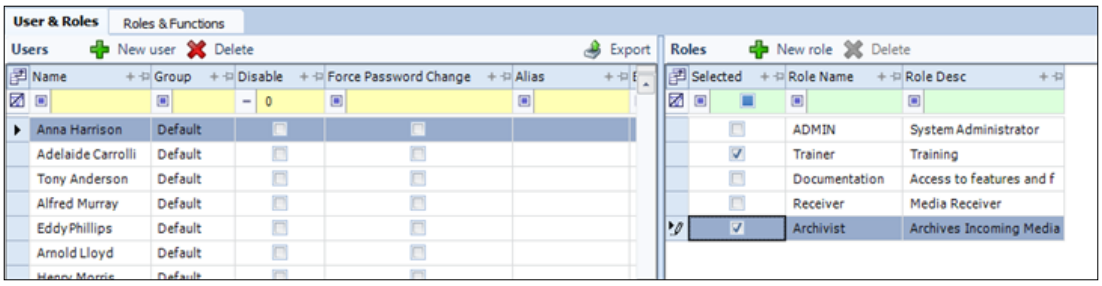
Note:
You can force users to change their password by selecting the checkbox in the **Force Password Change** column for the user.



After creating the user, the Administrator must assign the role(s).

To assign the role(s):

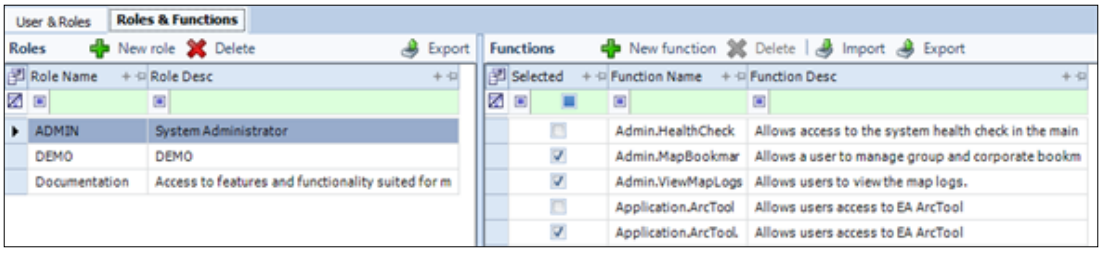
1. Select the new user in the **Users** grid.
2. In the **Roles** grid, select the checkboxes for the roles to assign to the new user. .
3. Click **Save**. The user now has the ability to access Exploration Archives according to the parameters of role.



To view the functions that are associated to a role, click the **Roles & Functions** tab.

Click a role in the **Roles** grid and the associated functions display in the **Functions** grid. The functions selected indicate the permissions that a user with that role will have.

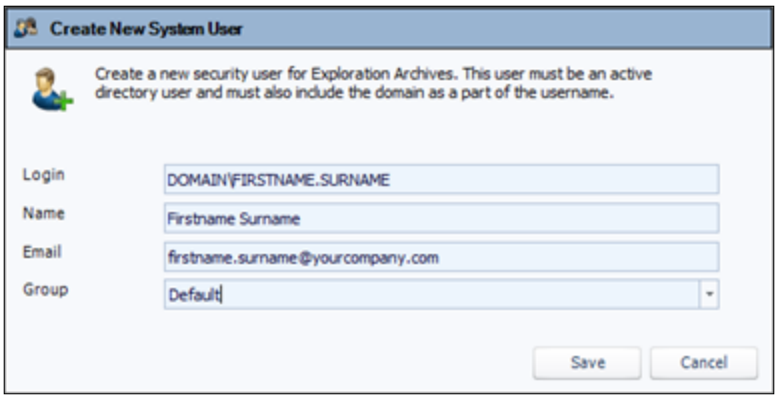
Note:
The functions assigned to a role affect all users.



1. In the navigation panel of Exploration Archives, open the **Management** category and click **User Security**. The **User Security** module opens in the workspace.
2. In the main toolbar, click **New**. The **Create New System User** window opens.

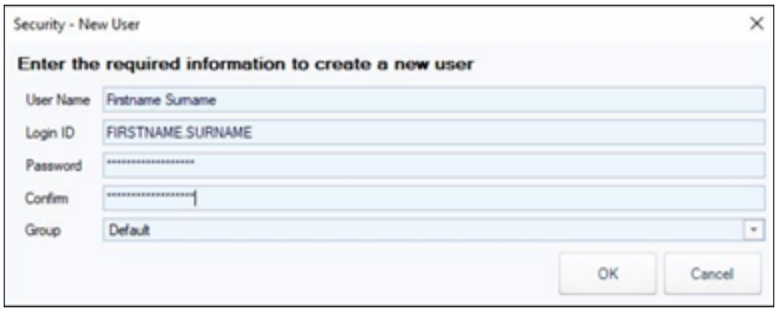
Exploration Archives can use two forms of authentication, depending on your setup.

Microsoft® Windows® authentication



1. In the **Login** field, enter the Microsoft® Windows® user authentication credentials.
2. In the **Name** field, enter the user's name
3. In the **Email** field, enter the user's full email address.
4. The **Group** field determines the **Dashboard** widgets that will display for the user.

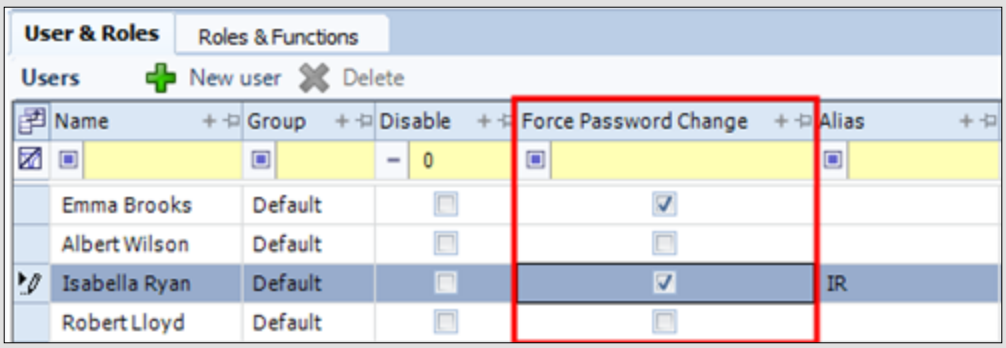
Server authentication



1. In the **User Name** field, enter the name of the user.
2. In the **Login ID** field, enter the user's first name and surname (separated by a space):
3. In the **Password** field, enter a password for the first login. **Confirm** the password in the next field.
4. The **Group** field determines the **Dashboard** widgets that will display for the user.

Click **Save** and a new row adds to the **Users** grid with the new user information.

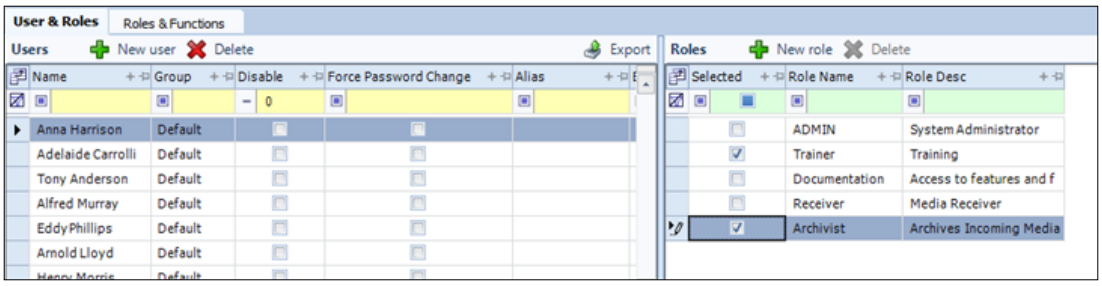
Note:
You can force users to change their password by selecting the checkbox in the **Force Password Change** column for the user.



After creating the user, the Administrator must assign the role(s).

To assign the role(s):

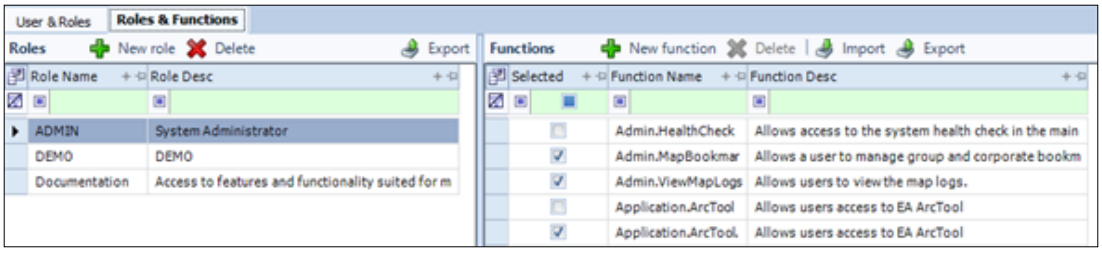
1. Select the new user in the **Users** grid.
2. In the **Roles** grid, select the checkboxes for the roles to assign to the new user. .
3. Click **Save**. The user now has the ability to access Exploration Archives according to the parameters of role.



To view the functions that are associated to a role, click the **Roles & Functions** tab.

Click a role in the **Roles** grid and the associated functions display in the **Functions** grid. The functions selected indicate the permissions that a user with that role will have.

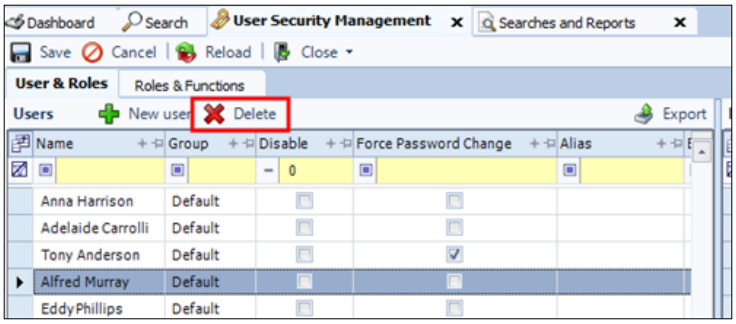
Note:
The functions assigned to a role affect all users.



Deleting or disabling a user profile

> **Note:**
> Deleting or disabling a user profile in Exploration Archives requires administration access.

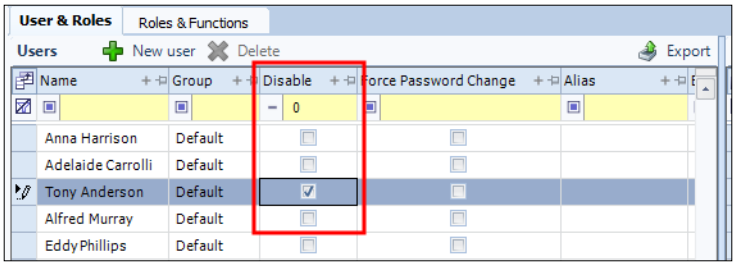
To delete a user profile, select the user in the grid and click **Delete**.



> **Note:**
> The delete button will remain dimmed if the user has done any work in Exploration Archives .

You can disable a user profile at any time:

To disable a user profile, locate the user in the **Users** grid and select the checkbox in the **Disabled** column. In the main toolbar, click **Save**.



To filter the grid to display either all disabled users or all active users:.

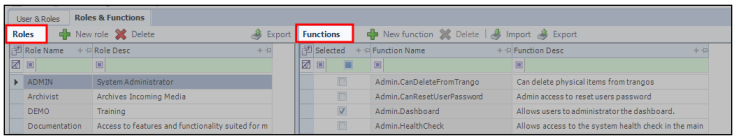
In the filter row of the **Disabled** column enter **0** to display active users, Enter **1** to display disabled users.

The default grid view displays both disabled and active users.

Roles & Functions

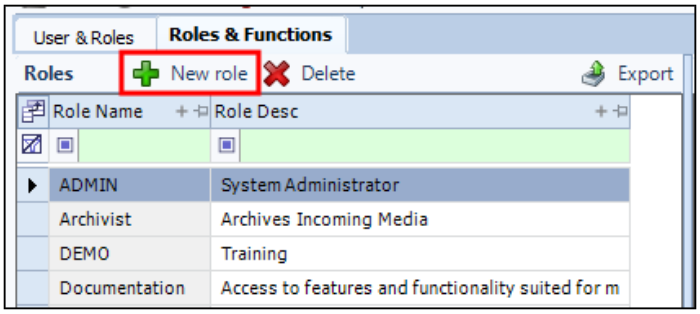
> **Note:**
> Creating and editing Roles & Functions requires administrative access.

The **Roles & Functions** tab allows you to create roles and assign or edit the functions that roles have access to. The tab is divided into 2 panels. **Roles** are on the left, while the **Functions** are on the right.

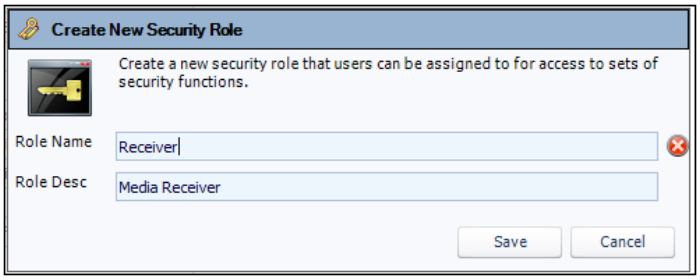


To create a new role:

1. On the Toolbar, click **New role** on the role panel.



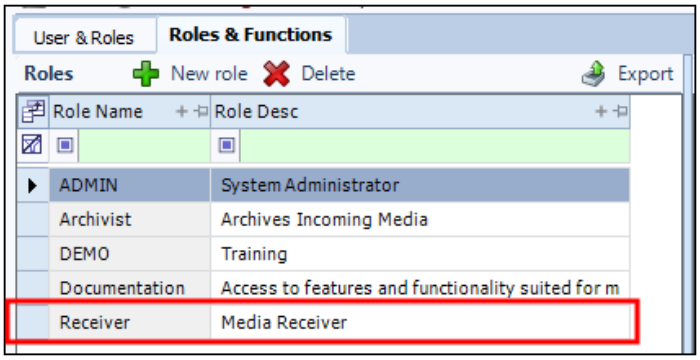
2. The **Create new security role** window will open.



> **Note:**
> The circular X beside the fields indicates required information. When the fields have been filled and verified the indicator(s) will disappear.

3. After entering the information, click **Save**. The window will close and the role will be added to the

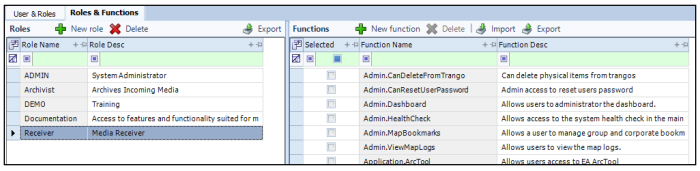
grid.



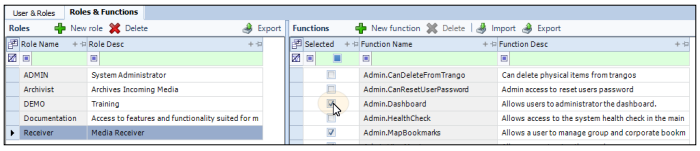
Once a role has been created, you can assign **functions** to it.

To assign functions to a role:

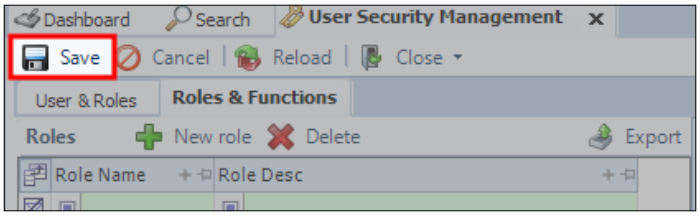
1. Highlight the role under the Roles section. The functions panel will display the functions available.



2. Select the check boxes of the functions the role will have permission to use.



3. From the toolbar, click **Save**. The role will be saved with the functions.



7.4 System Settings

> **Note:**
> System settings are only available to users who have administration privileges.

The System settings module is used to configure the various features of Exploration Archives. This is where, for example, you can set up custom workflows as needed (e.g.

different rules and visibility on the Catalog module) and also defining your required fields (Screen config) to standardize your pick lists to normalize data.

This section will contain information on Mapping, Application Groups, and File Mapping.